Chart Module

User Guide – V 12.0

January 21, 2025

PARKLANE SYSTEMS

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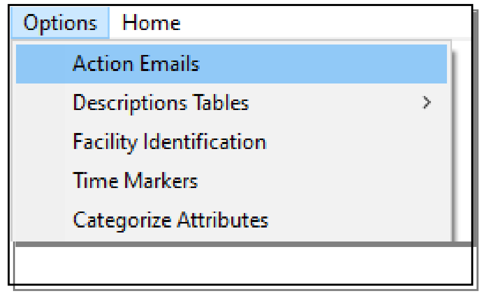
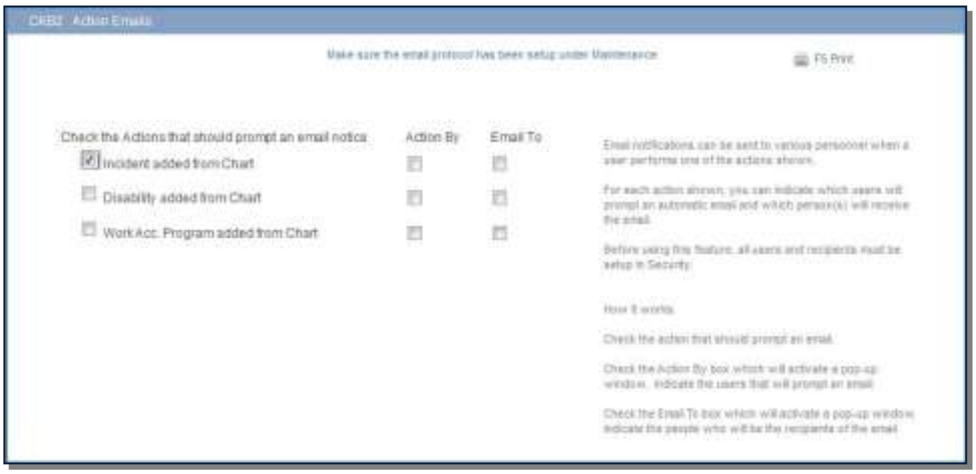
Options

Action Emails



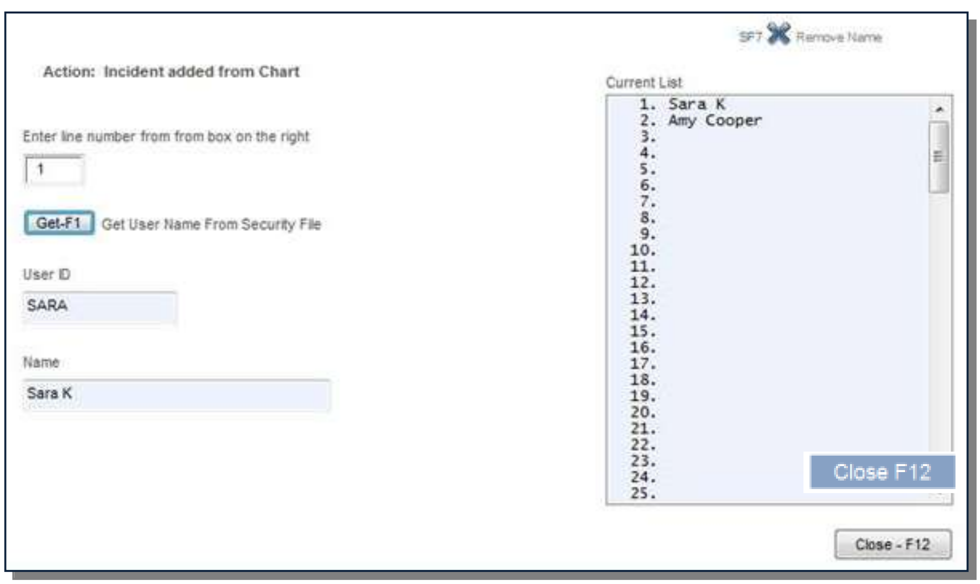
Email notifications can be sent to various recipients when a User performs one of the actions identified on the list. From the Main Menu, ensure that the email protocol has been setup under Maintenance before proceeding with the setup of **Action Emails**.

Select the **Actions** that should prompt an email notification by clicking on the corresponding check box.



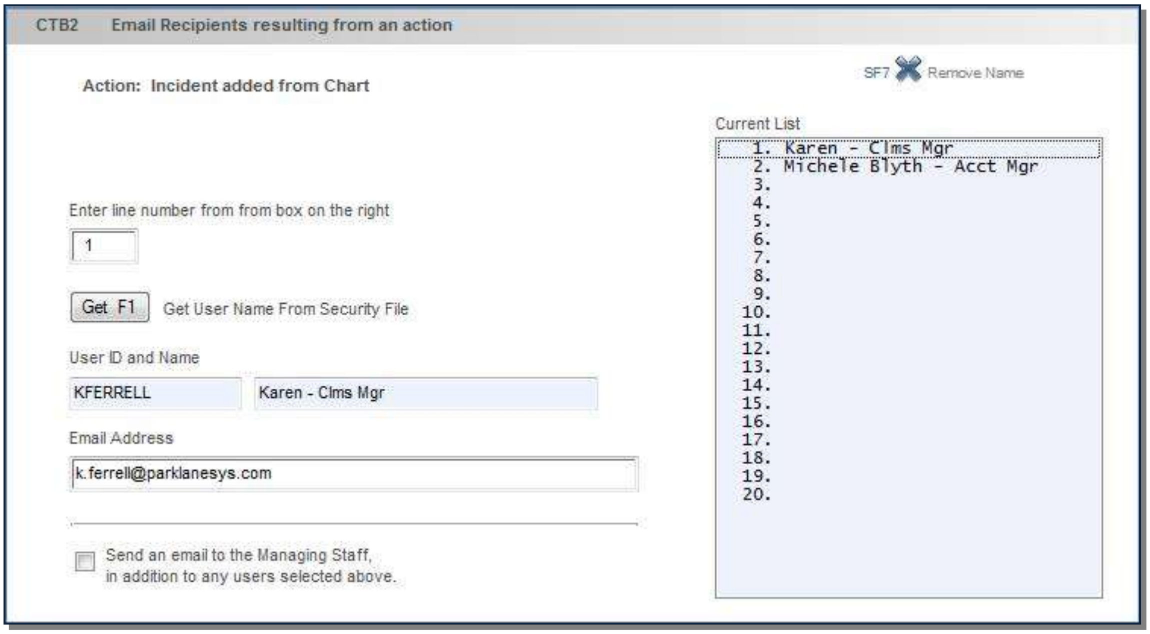
For each **Action** selected, click on the **Action By** check box to activate the pop-up window to select the Users whose action will prompt an email. On the left of the pop-up window enter the first available blank line number from the **Current List** shown on the right. Click the Get-F1 to see and select the User Name from the Security File. Repeat to add another User to the list.

Click Closed-F12 to return to the Action Emails panel and proceed to the **Email To** check box for each **Action** selected to activate the pop-up window.

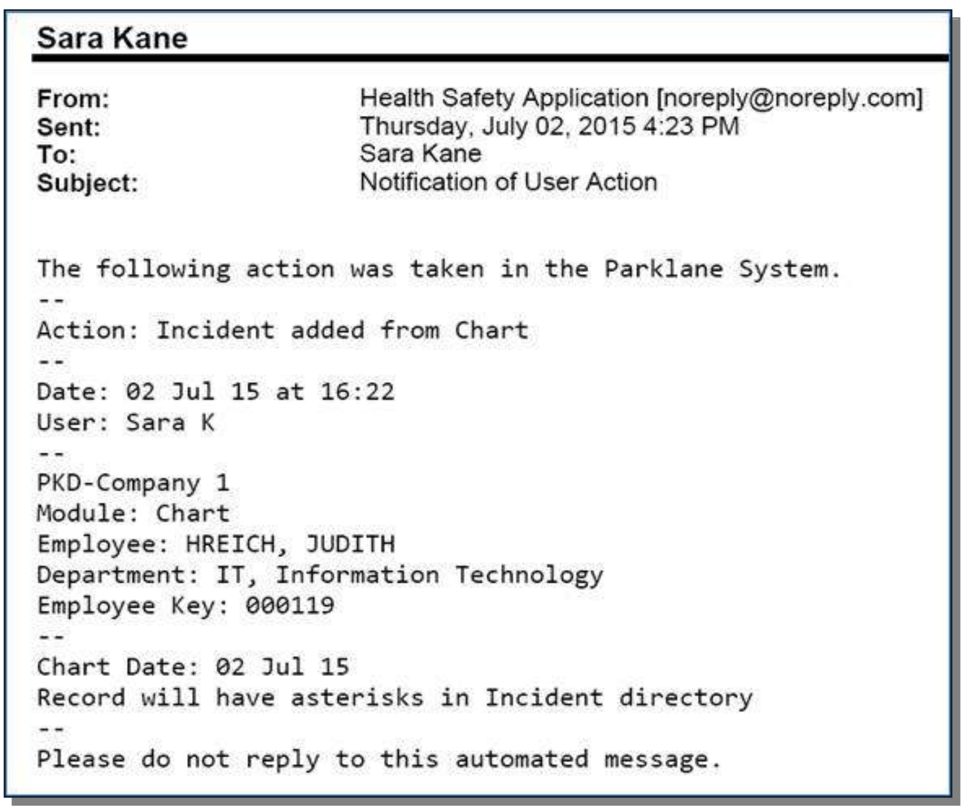


The **Email To** pop-up window is used to select the **Email**

Recipients resulting from the action. On the left of the pop-up window enter the first available blank line number from the **Current List** shown on the right. Click the Get-F1 to see and select the User Name from the Security File. Repeat to add another Recipient to the list.



Each time an Action is executed by a listed User, the Recipient will receive an email advising that the Action occurred.



Sara Kane

From: Health Safety Application [noreply@noreply.com]
Sent: Thursday, July 02, 2015 4:23 PM
To: Sara Kane
Subject: Notification of User Action

```
The following action was taken in the Parklane System.
--
Action: Incident added from Chart
--
Date: 02 Jul 15 at 16:22
User: Sara K
--
PKD-Company 1
Module: Chart
Employee: HREICH, JUDITH
Department: IT, Information Technology
Employee Key: 000119
--
Chart Date: 02 Jul 15
Record will have asterisks in Incident directory
--
Please do not reply to this automated message.
```

Description Tables

The information compiled within the **Chart** module can assist in determining the major reasons for Health Care visits and resulting loss of productive time. This module also provides statistical information that can be used by management to assess the organization's health and safety and employee assistance program needs.

Anyone using the **Chart** must be given their own password along with a User ID for tracking and auditing purposes.

Before **Chart** can capture specific information related to a visit, there are 5 tables that need to be built. The client must define **Classifications, Reasons, Conditions, Treatments, and Actions**.

It is crucial that the description types reflect viable data related to a health centre visit. As an example:

1. 'Class' would reflect an Occupational or Non-Occupational visit for example.
2. 'Reason' would identify whether the visit was Initial, a Follow-up, Report by Phone, or perhaps a Consultation.
3. 'Condition' would identify the employee's presented illness or injury.
4. 'Treatment' perhaps would include specific medications provided and procedures conducted.
5. 'Action' would identify the end result of the visit. Did the employee return to work, go to their physician, go to the hospital, or go home?

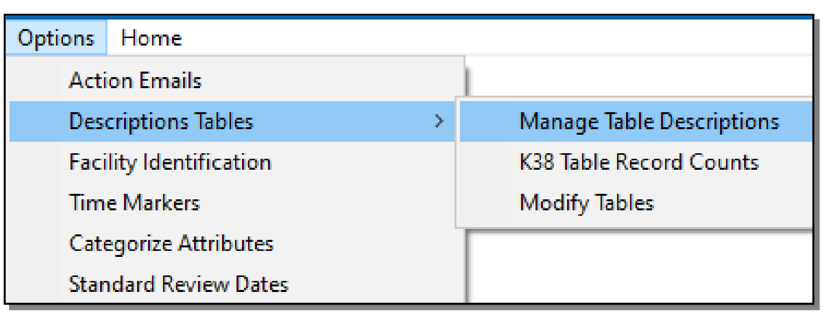
Ideally these table descriptions should allow the user to ask detailed meaningful questions of the system.

For example:

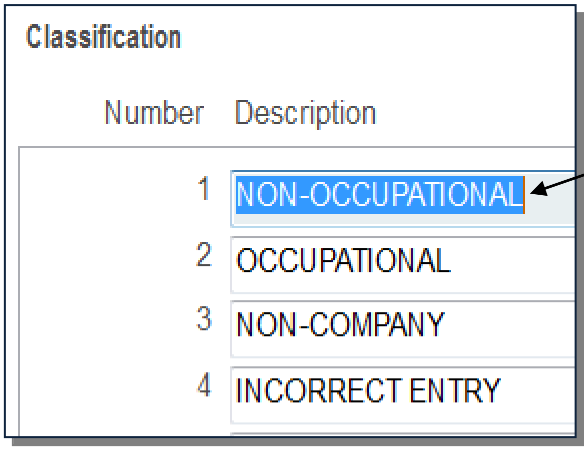
1. How many: Non-Occ / Occ / Non-Company
2. That were: Initial / Follow-up / Reported by Phone
3. Due to: Abrasion / Flu / Needlestick / Stress / Burn
4. Required: Cleansing / Dressing / Ice Pack / Medication / Consult
5. Resulting in: Return to Work / Mod Duties / To Family Doctor / To Emerg / Referral

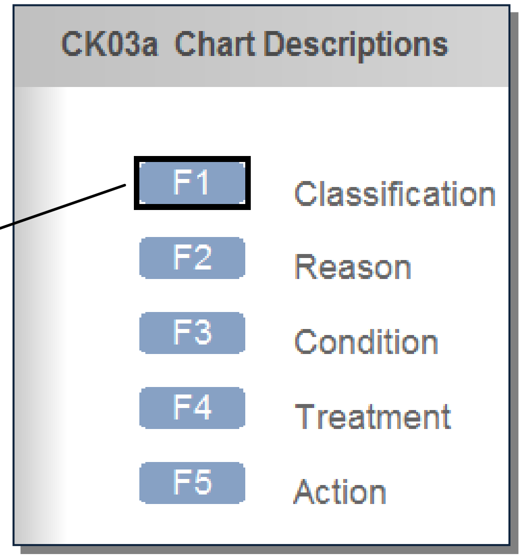
Optionally, an attribute can then be highlighted to identify the specific body part.

From the menu, click **Options/DescriptionTables/Manage Descriptions** and select the table heading to be defined.



Enter your descriptions for the selected table



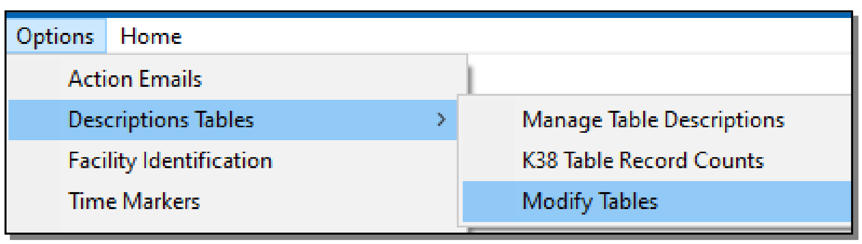


Please note that when accessing these tables through a Chart record, the panel will sort the table alphabetically.

Modify Tables

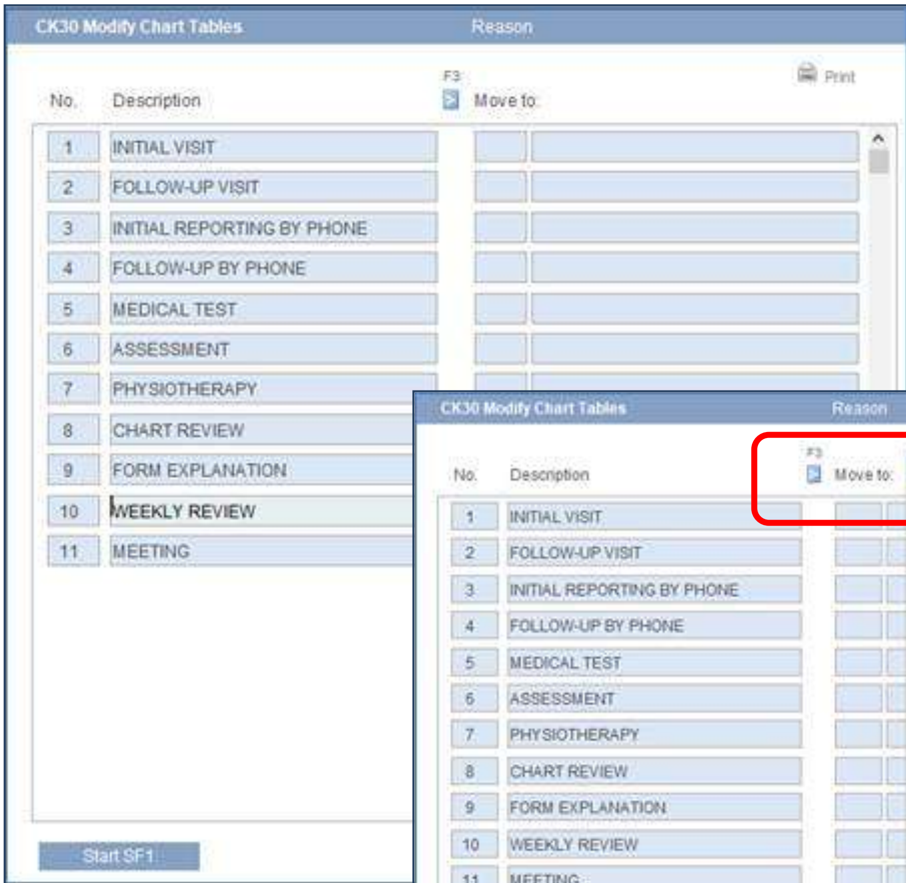
Note: Changes cannot be reverted back once the revised table has been used.

Tagged entries may be moved or merged within a table. Run the K38 Table Record Counts. Determine which Table No. the entries are from and the Table No. the entries are to be move to. All users must be out of Chart and a Password must be obtained from Parklane Support before continuing with this procedure.

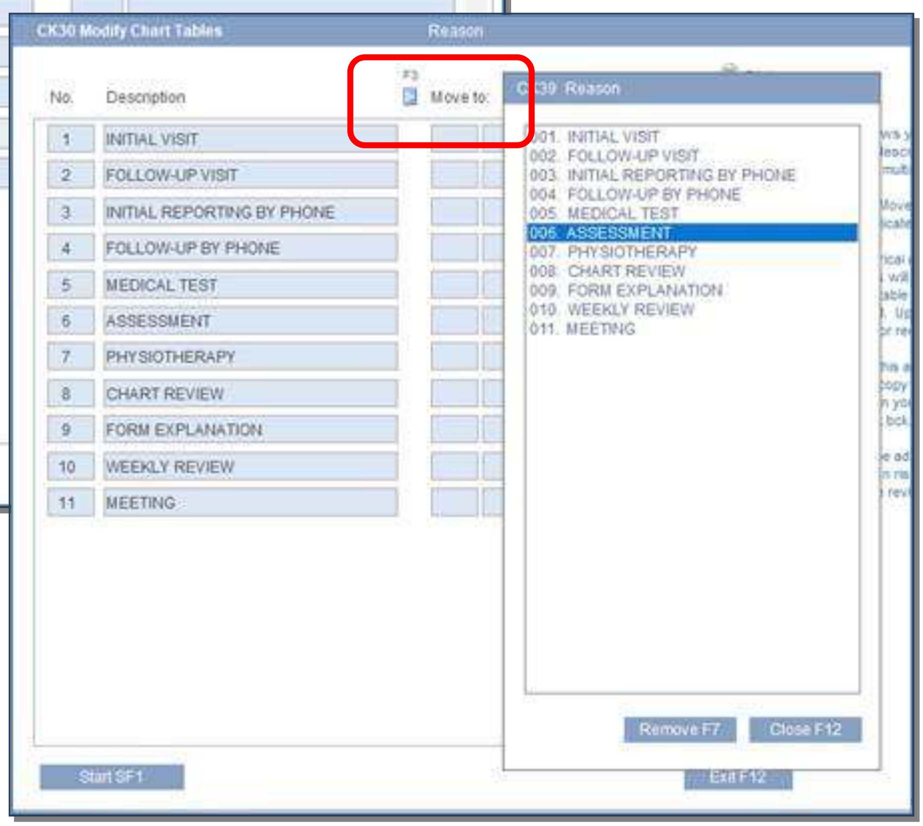


Enter the Password obtained from Parklane Support and press **Continue F5**. Select the Table in which the move or merge is required.

Move cursor to the desired table entry. In this example, entry number 10.

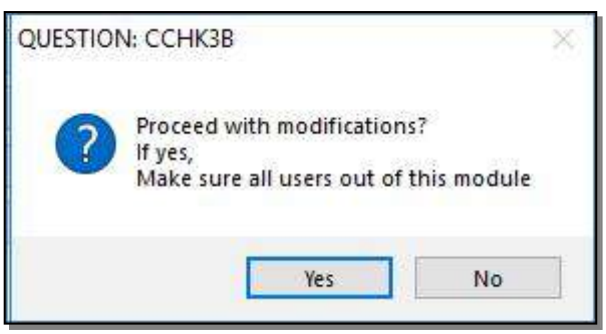


Select **F3 Move to** and indicate the new table entry.

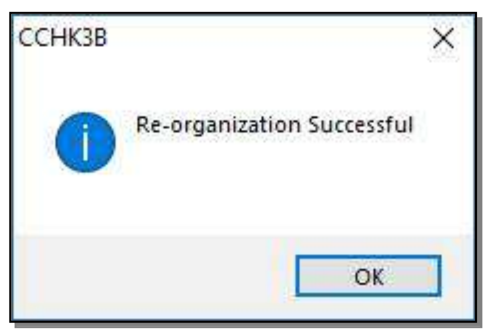


Once selected, the panel will reflect the move/merge request. Note that all historical records will reflect the changes and all changes will be recorded in the Audit. The old table entries/descriptions will be automatically removed once this process is complete. Prior to the system processing the changes, it will make a copy of pertinent files. These files will be located in the HS folder as HT0028.bck, HT0004.bck and HT00MA.bck

Press **Start SF1** to continue. Confirmation will be required to proceed by selecting **Yes**.



The system will acknowledge the move/merge is complete. Press **OK**.



Run the K38 Table Record Counts following the move/merge and confirm the record counts against the original K38 report.

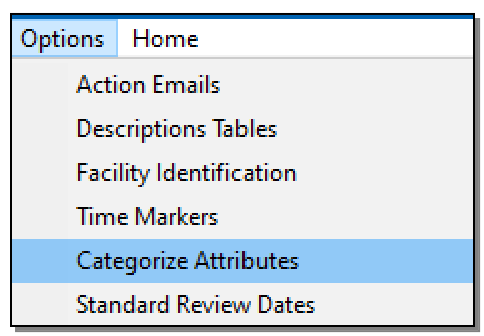
Time Markers

To setup the user-defined tables for Time Markers, from the main menu of Chart, click on **More** than **Options/Tables/Time Markers.** The panel will default to the **Wait Times** table. Select the next available **Table no.** and then the **Description** field.

Once complete, click **F2 Notable Activities.** Select the next available **Table no.** and then the **Description** field.

Categorize Attributes

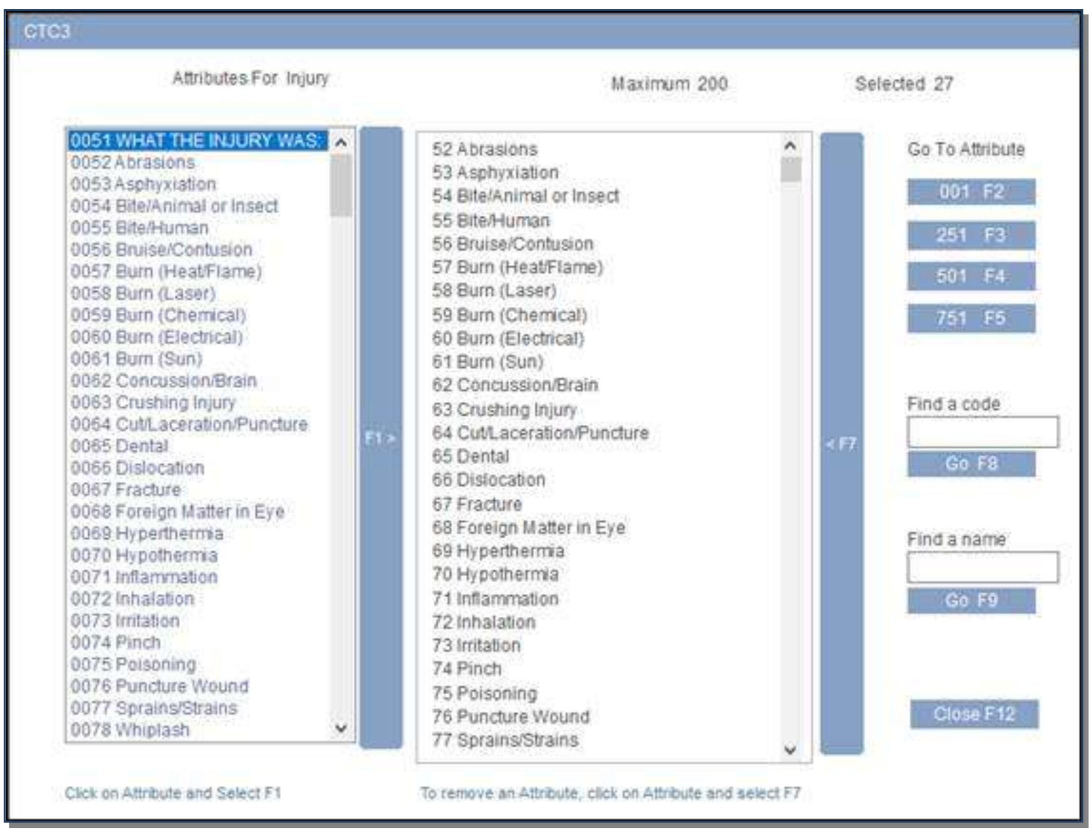
To streamline the process of selecting attributes from a large table, they can be organized by category. For this module, setup the categories for the attributes which apply. Any excluded attributes will no longer appear in this module. On any of the panels where attributes are available to you for selection, including reports, you can select the category and then select the required attribute from the list associated with that category. It is an easy step to switch to other categories.



To categorize attributes, from the main menu of Chart, click on **More**, then **Options/Categorize Attributes.**

Using the arrow, select the next available category (initially the drop down list will show Category1, Category 2, etc.) and then type in the **Category Name** which you wish to use for your selection of attributes.

Click on the **F1>Select Attributes** button and you will be presented with the **Attributes for Category** panel:



Select an attribute and press **F1** to assign it to this Category. As you select the attributes they will appear in the box on the right. When finished, click on the **Close-F12** button to return to the Categorize Attributes panel

Standard Review Dates

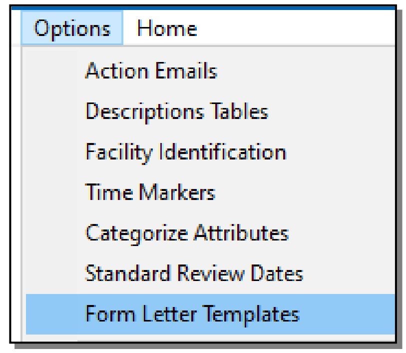
Standard Review Dates allow the setup of multiple sets of routine activities that are normally done when tracking or following up on a record.

Select a set identifier and enter a **Description** name for the set. You may enter routine follow-ups and identify the interval (number of days) in relations to the start date of the record. You may enter up to 50 pre-defined activities or procedures per set. The interval days will be used to determine the target date of the activity.

Once the Standard Review Dates are defined you may access the **Review Dates** panel of a new or current record and click on **Standards** and the system will provide the list of sets. Once a set is selected, the system will auto-fill those standard activities and determine the target date for each.

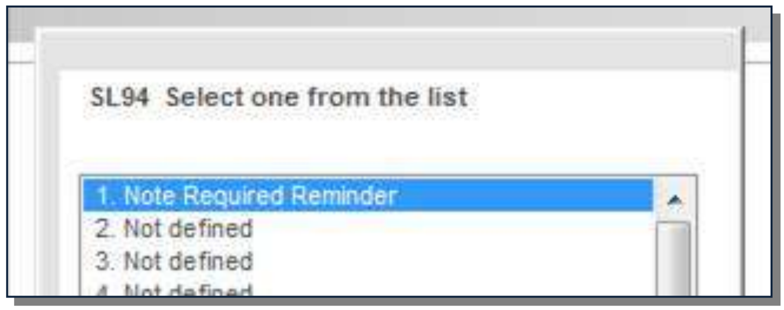
Form Letter Templates

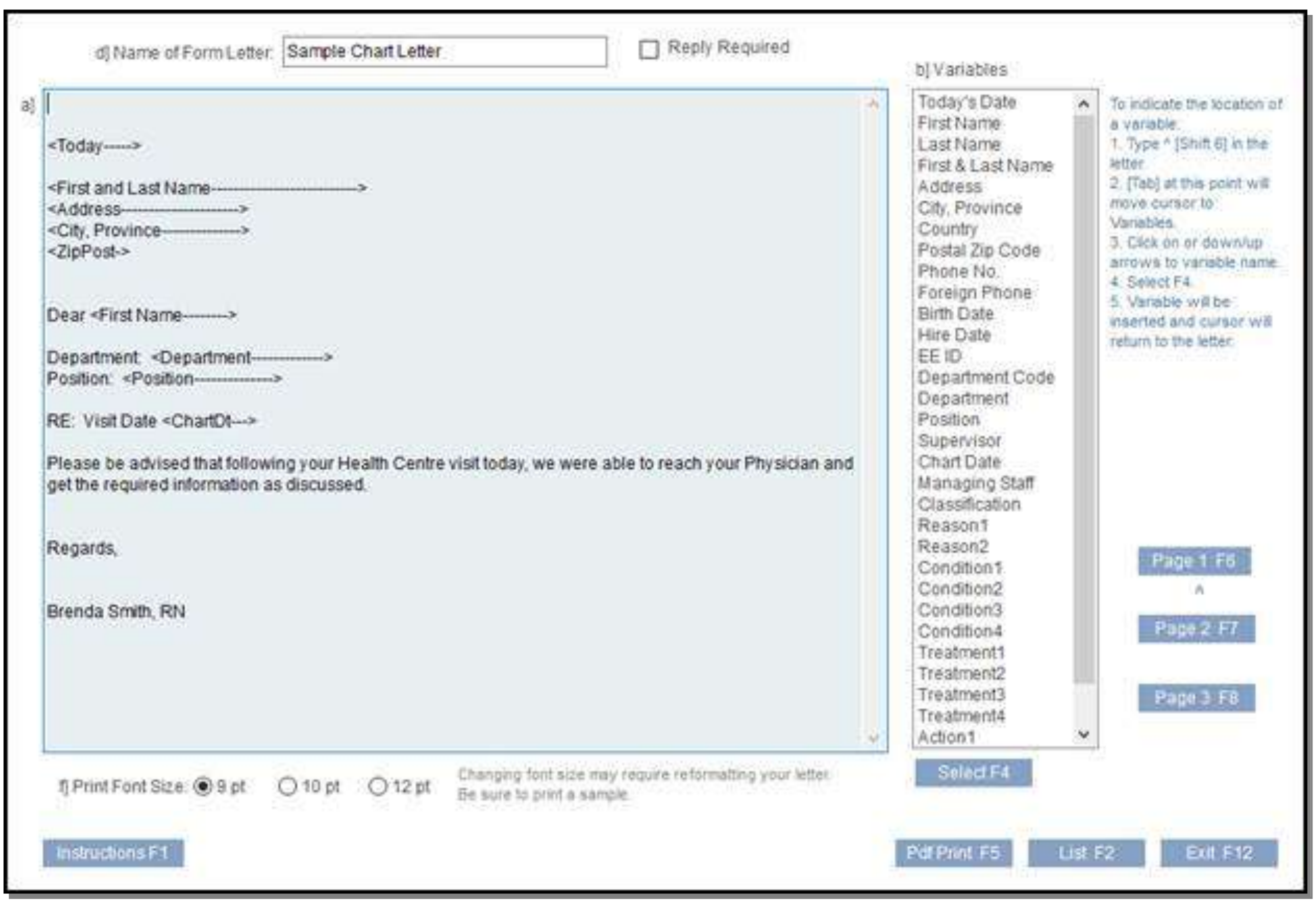
Form Letters can be used to send notices of letters to your employees. To create up to 50 letters, click on **Options/Form Letter Templates**.



Click on an undefined number.

Name your letter and then begin to compose the letter using text and variables.





Click the **Instruction F1** button to see detailed instructions and additional features in **Form Letters**.

PARKLANE SYSTEMS

Form Letter Templates

Introduction

Form Letters give you the means to set up letters that you will use repeatedly.
You initially create a template for a letter and from that point on, you may easily produced personalized letters with the original text and applicable information included.
The letters may then be printed or emailed directly from the software. All emailed form letters are automatically added to Document Links.
A form letter may be one to three pages in length.

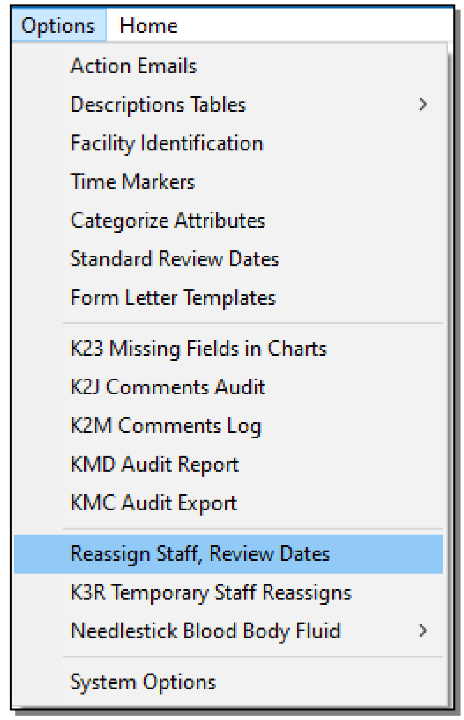
How to Use

Template

Select a template from the list.

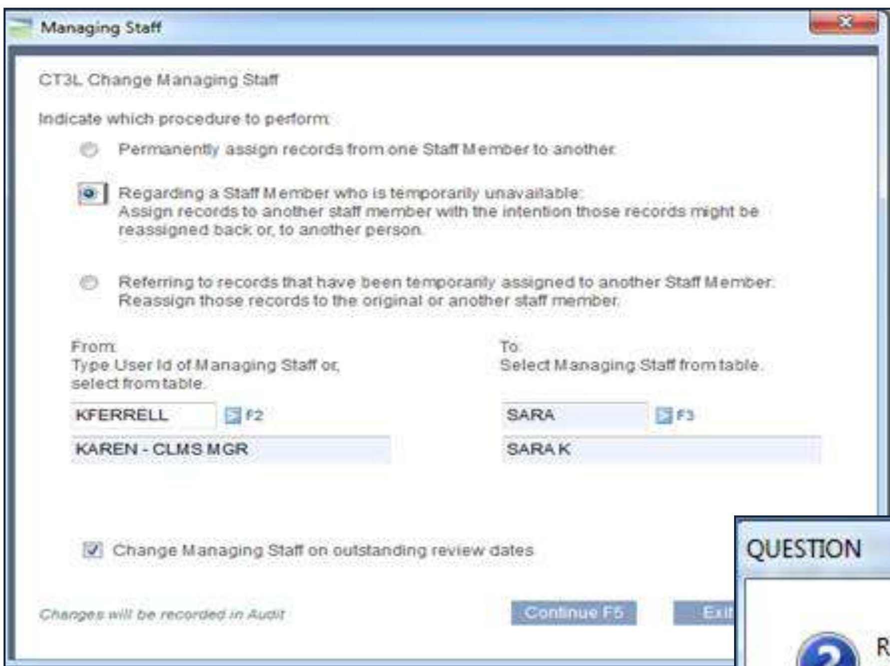
- For a new template, select the first 'Not Defined".
- Provide a name or description of the template.
- Under "Variables" there is a list of the personalized information that can be inserted in the template.
- In the Template area, type the text as it is to appear in the letter.

Reassign Managing Staff on Review Dates

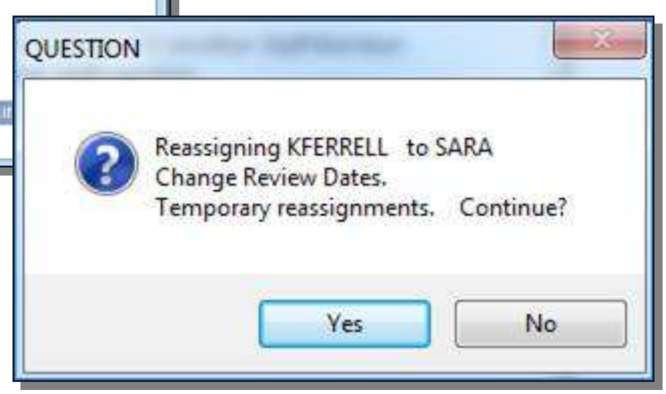


As staff depart, vacation, take leave, or changes in user caseload are necessary, this utility provides the ability to permanently or temporarily change the Managing Staff field for all outstanding Review Date records from one User ID to another. In the case of a temporary reassignment, the records can be reassigned back to the original user or another user.

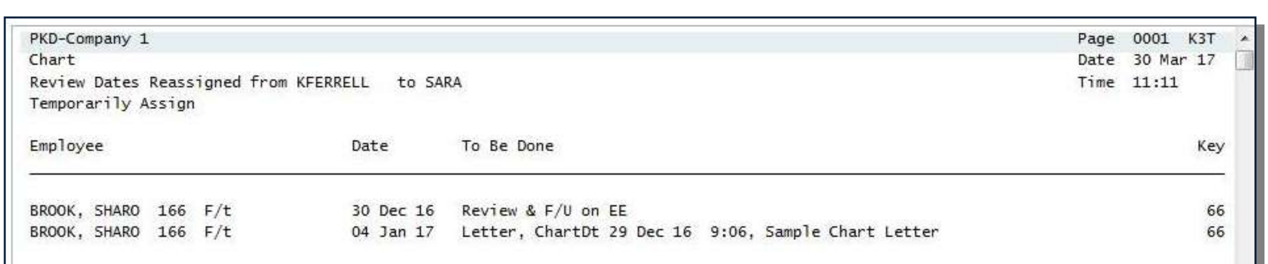
Under **Options** select **Reassign Managing Staff on Review Dates**. Select the intended procedure by clicking on the radio button. Type or select the User ID of the Managing Staff the records will come from, then type or select the User ID of the Managing Staff the records will be reassigned to and press Continue F5.



A question box will appear asking for confirmation of the reassignment.



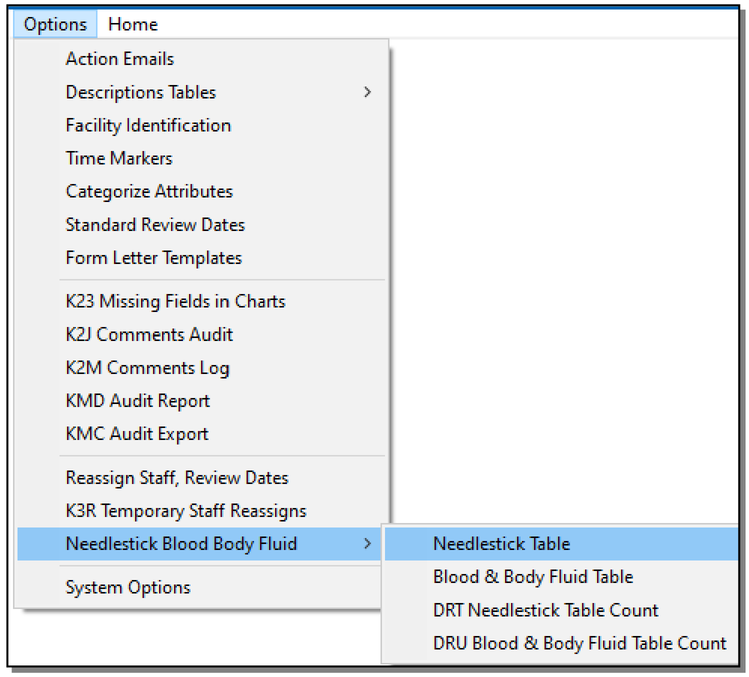
Once the utility is complete, a report will be generated which provides the details of the reassignment.



Needlestick, Blood, Body Fluid

In order to simplify the population of these tables, Parklane can electronically provide pre-defined descriptions at your request. Contact Parklane Support for details.

To manually setup the user-defined tables for Needlestick & Sharp Object and Blood & Body Fluid Exposure, from the main menu of **Chart**, click on **Options/Needlestick, Blood, Body Fluid**. Click on the first flyout to proceed to **Needlestick Table**:

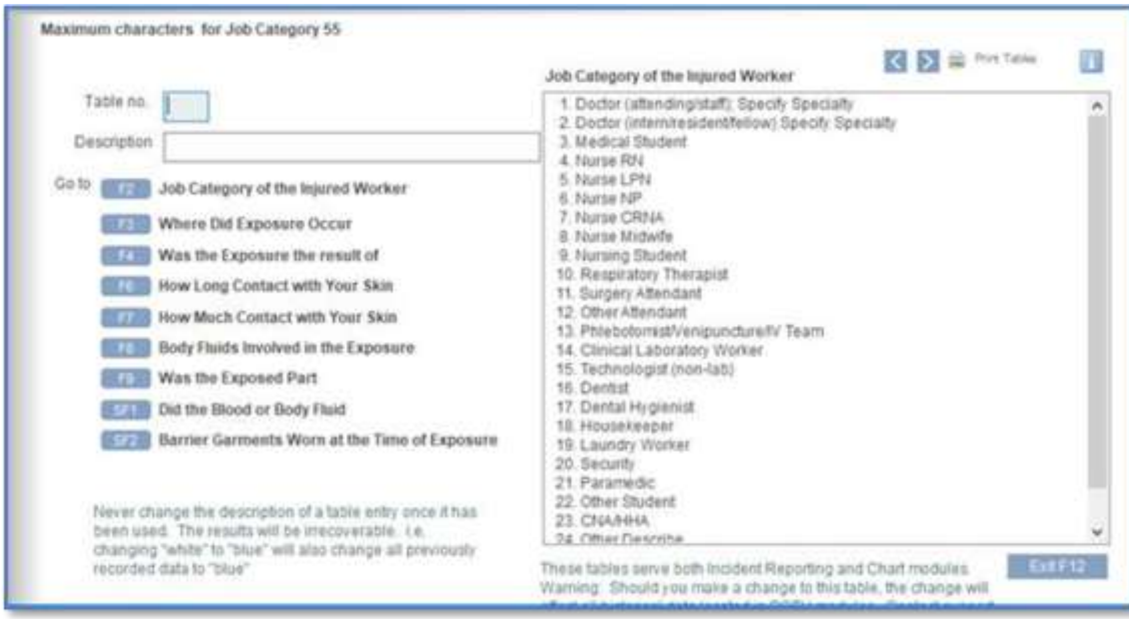


Needlestick Table

Select the table which you wish to update/modify by clicking on the appropriate button. The tables in this grouping allow for a maximum of 50 entries each.

Click on the second flyout to proceed to the **Blood & Body Fluid Tables**:

Blood & Body Fluid Table

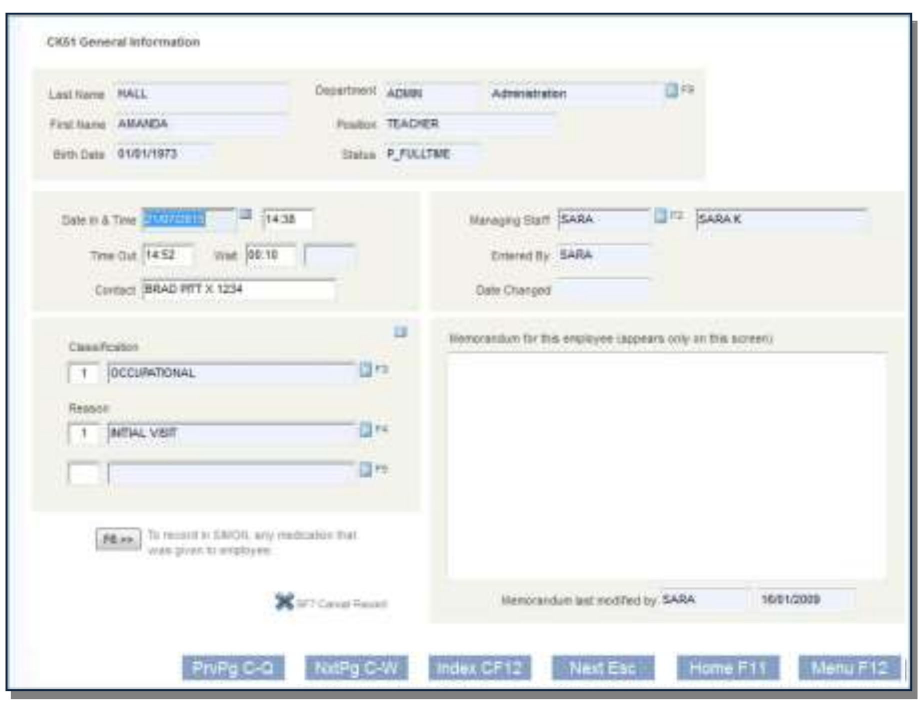


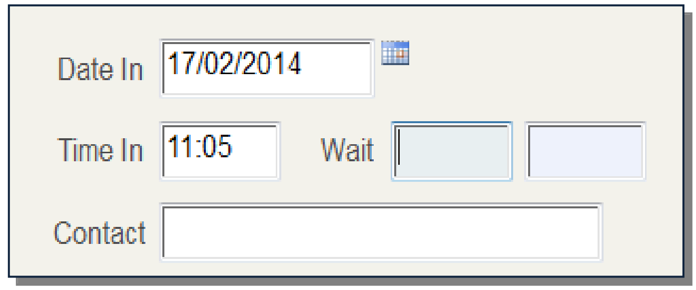
Proceed in the same manner as described above. The tables in this grouping allow for a maximum of 50 entries each

Add/Open a Chart Record

To add or open an existing record, click on **Chart** and select **Add New Chart Record** or **Open Chart Record** from either the drop down or the Sidebar menu. Select an employee and follow the panel instructions. Adding a new chart will open a blank record ready for data input. Opening will show a listing of the employee's chart records to date. You may look at any of these records or click on **Add Chart**. In either case the system will present a panel which defaults to the current date and time. Changes may be made to these fields as necessary.

General Information





- The **Date In** and **Time In** fields will auto-fill.

- **Wait** is the amount of time the employee had to wait before being seen. There are statistics available on **Wait** time that may help you in determining future staff requirements.

- **Contact**Error! Bookmark not defined. is a text field in which the user could note the employee's supervisor and/or telephone extension as a reference for future communication.

- **Managing Staff** will also be auto-filled with the name of the user currently logged into the system. However, should another user be responsible for managing this record, you may select the name from the directory provided. All reports selected by staff will be based on the Managing Staff user identified.

- **Entered By** is auto-filled with the name of the user currently logged into the system. This allows for all data entered, and any changes made to be tracked and audited in the background of the system.

- The next two fields are table driven. Choose the appropriate **Classification** and **Reasons** by selecting from the corresponding list box located at the right of the panel.

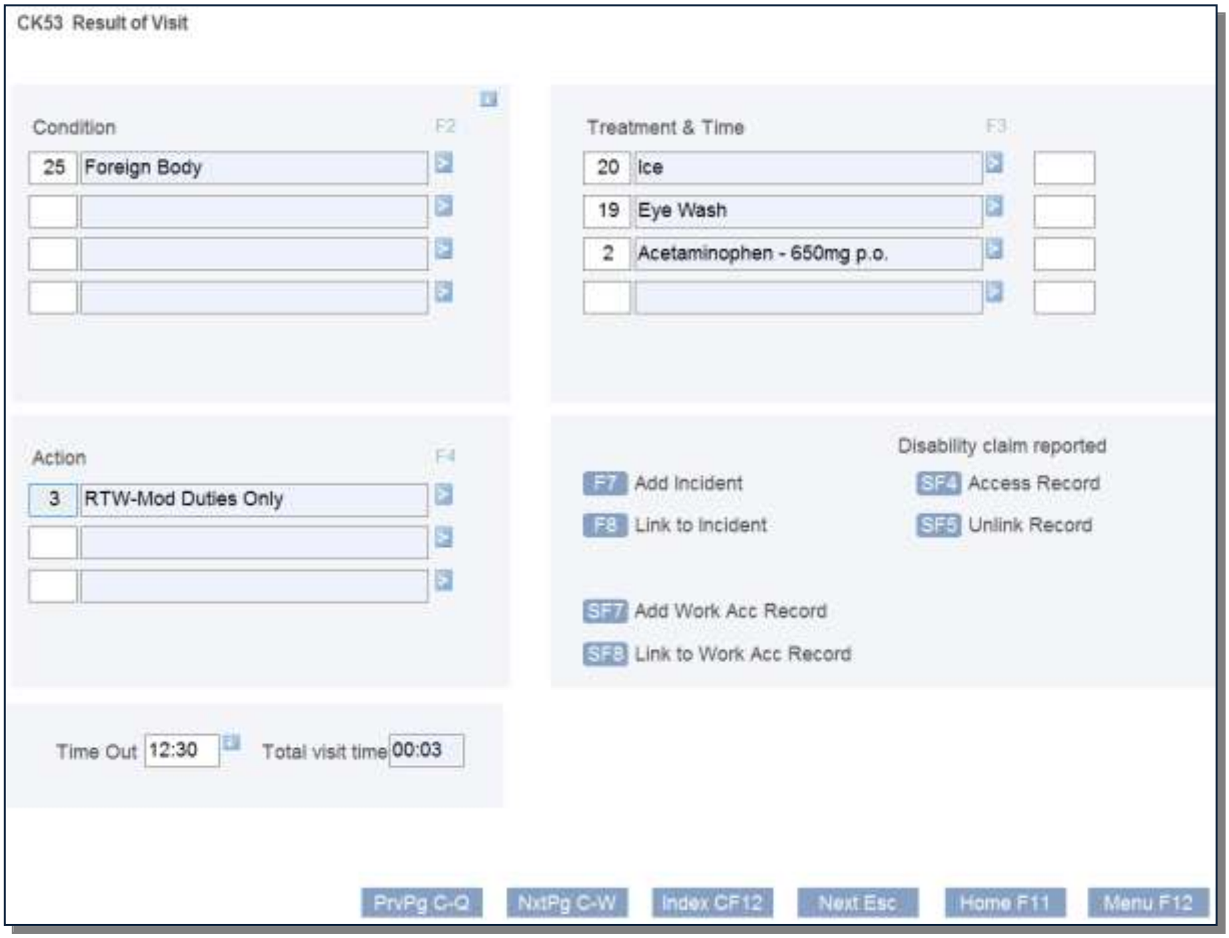
- **Memorandum for this employee** allows the user to enter or view the text specifically in Chart regarding this employee.

- **Cancel Record** allows the user to cancel a chart record. From the **List of Chart Records**, the user may click on **F2 Show Cancelled Records** to see any records previously cancelled for an individual. A cancelled record may be **Reinstated** by clicking on the blue arrow at the top center on the **General Information** panel.

- **Copy Last Record** will auto-fill the **Classification**, **Reasons**, **Conditions** and **Treatments** from the last chart record entered for that employee. This significantly reduces data entry in situations where the employee is repeatedly attending the health centre for the same issue, ie. Physiotherapy.
  NOTE: Only available under **Add new chart record**.

Result of Visit

The next three fields are table driven. Choose the appropriate **Condition, Treatment and Action** by selecting from the corresponding list box located at the right of the panel.

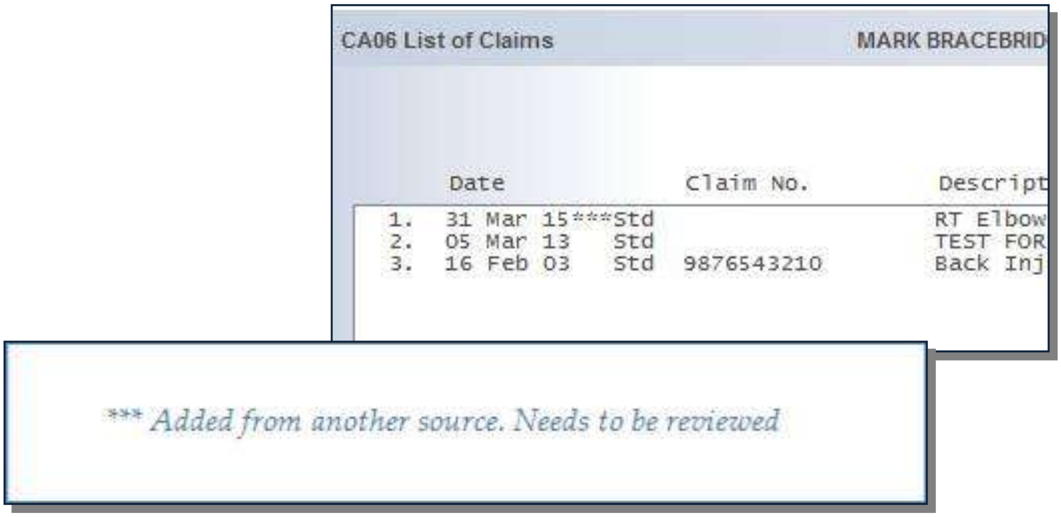


- **Add** allows the user to instantly switch to the **Incident, Disability or Work Accommodation modules** to add a new record. When the **Add** button is pressed, a blank record opens to the Description panel of the selected module. At this point the user may simply initiate the record by entering related details on any related record panels. When the **Menu** button is pressed, the user is returned to the **Results of Visit** panel of the **Chart** record. Only the modules the user has access to will be shown on the panel.

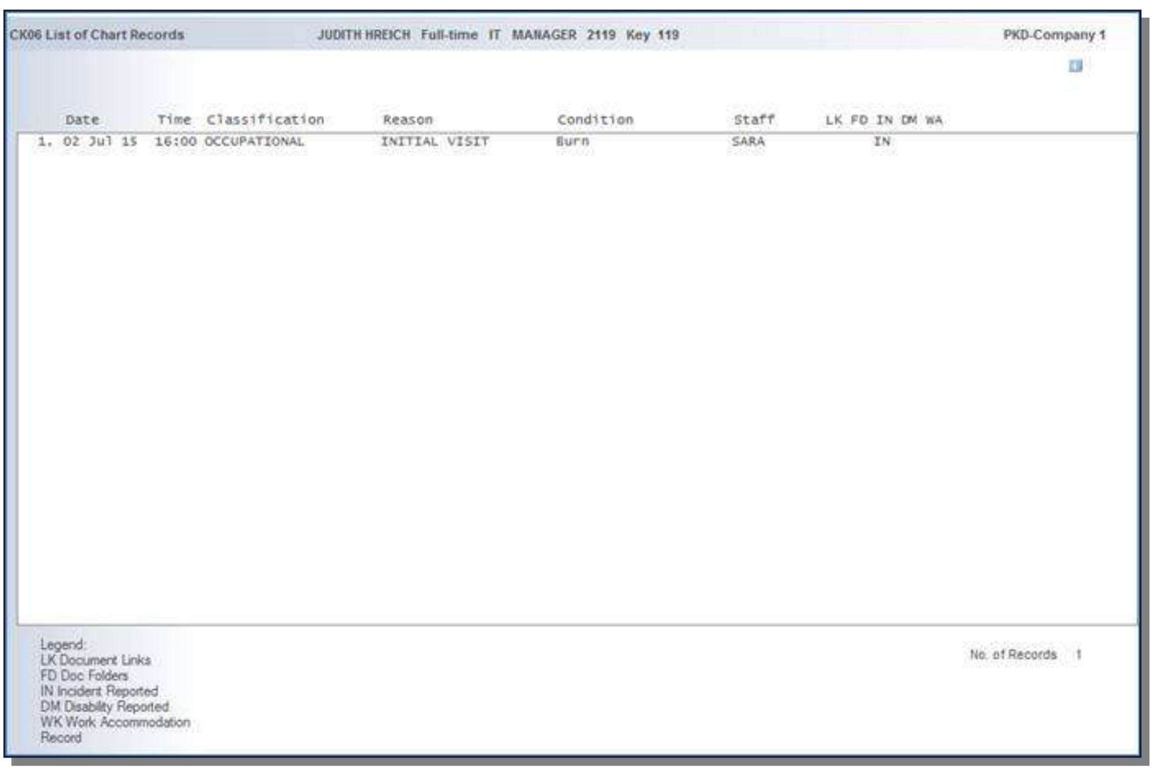
- **Link** allows the user to instantly switch to the **Incident, Disability or Work Accommodation modules** to link the **General Comments** of this chart to an existing record. When the **Link** button is pressed, the employee's list of records from the selected module appears. Click on the record that the General Comments should be linked to, and the system will automatically return to the **Results of Visit** panel of the **Chart** record. Only the modules the user has access to will be shown on the panel.

- **Time Out,** when entered, will calculate the total time of the visit.

When using the **Add** feature, the record added from Chart will have asterisks with a note at the bottom of the panel indicating the record was added from another source and needs to be reviewed.

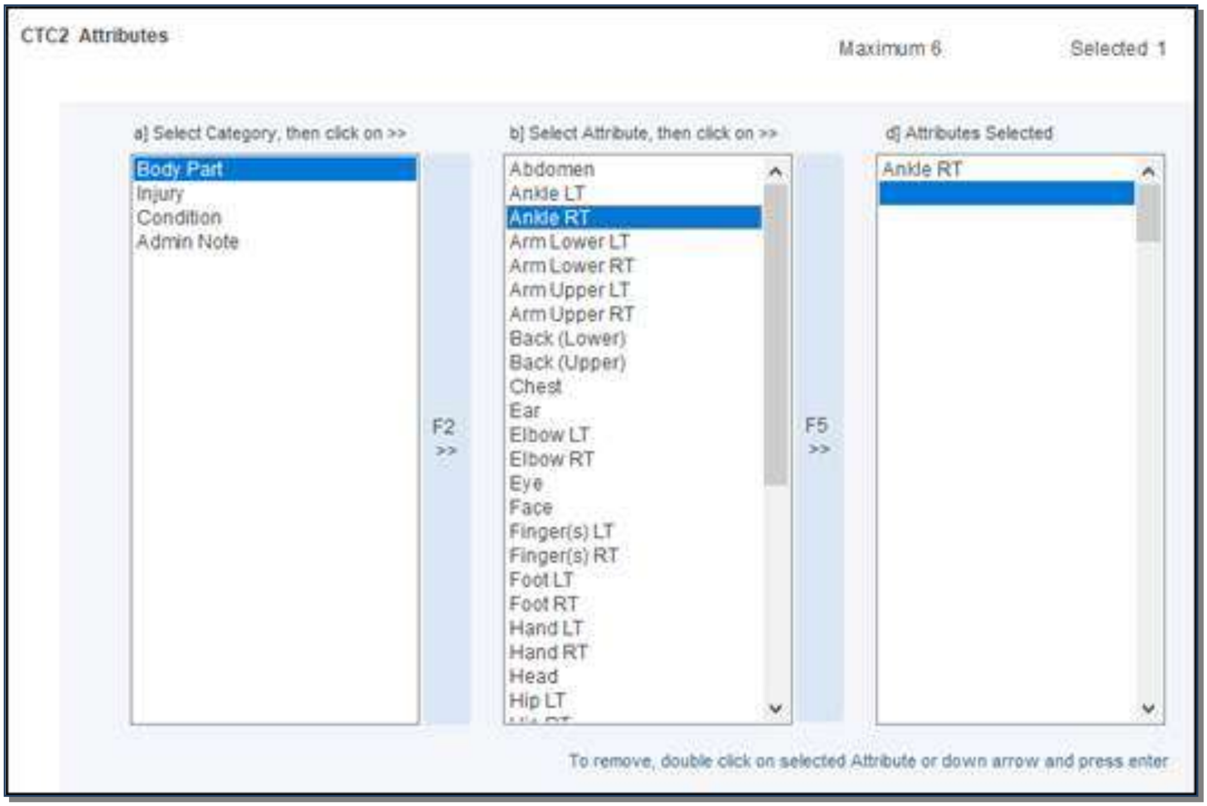


The Chart Directory for the employee will indicated in columns to the right that the Chart record is linked to a module.



Attributes

Access the Sidebar menu to select the **Attributes** panel. Make the appropriate selection(s) of Category from the choices in the left column and select an attribute(s) from the Category. The selected attributes will appear in the right hand column. Those tagged on a Chart record will be reportable within the Chart module only.

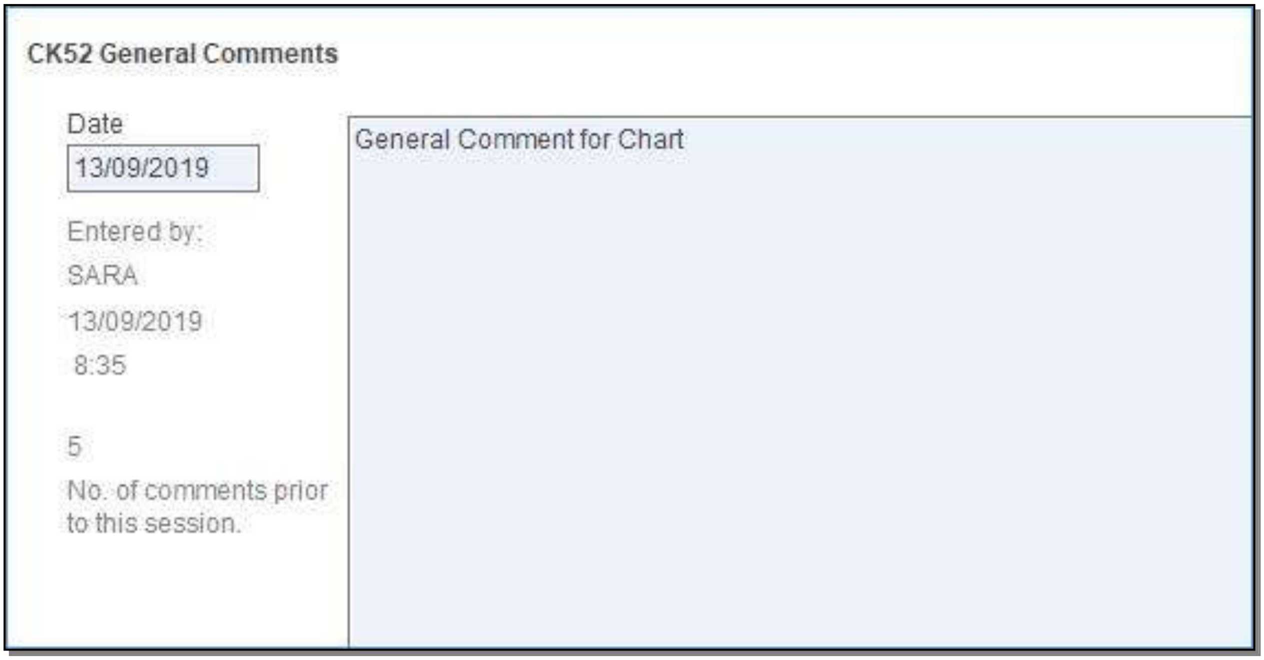


If an Attribute is selected in error, double click on the selected error. The system will ask if the Attribute should be deleted. Indicate **Yes** and that Attribute will be removed from the list of tagged attributes.

General Comments

General Comments opens a blank text box and is used to record additional information of a general nature. Each box of Comments entered will be tagged with the user's ID, date and time. While working in Comments, you may make changes to any text currently entered. However, when you exit, the **General Comments** are "locked" and cannot be altered. You can add additional Comments in subsequent boxes.

General Comments can be viewed from the **Incident Reporting** module providing that you have given permission by linking a **Chart Record** to an incident.



Confidential Comments

Confidential Comments opens a blank text box and is used to record comments of a confidential nature. Confidential comments works the same way as General Comments with the exception that they cannot be accessed from Incident Reporting. Under Security, access can be denied to the Confidential Comments by the client to all Chart Records.

Review Dates (Employee)

Activities or follow-ups for an employee may be tracked under **Review Dates**. Pull pre-defined reviews by clicking **Standards F6** or click on **Add Activity**. Enter a date of the activity and tab to the User ID. The **User ID** will auto-fill based on the user currently logged into the system. The User responsible for completing the activity may be changed by clicking on the arrow at the top of the User ID column or by clicking the **Change User F9** button at the right of the panel. Tab to the **Activity** field and enter the activity.

The **Done** checkbox, when checked, will auto-fill a review date item, stamping it with today's date and the User ID of the user currently logged into the system.

The **See Details** checkbox will open a panel which allows the user to enter the **Action** taken related to the Activity, and enter a **Completion Date**. The system will auto-fill the **Done** checkbox. Do NOT check this box because it will overwrite your action.

Archive SF4 will place completed review dates in an accessible spreadsheet.

Several reports are available related to Chart Review Dates.

Form Letters

To generate a form letter for an employee click on **Get Template** and select from the drop down list provided. The variables associated with the chosen template will auto-fill as the form letter is displayed. Text may be inserted or deleted throughout the letter is required. Doing so will not change the master form letter template content. Each letter may be a maximum of three pages in length.

Print the letter by clicking on **Print to PDF**. Once the PDF opens, all application features are available to the user. Clicking Print will send the letter to a default printer to create a paper copy.

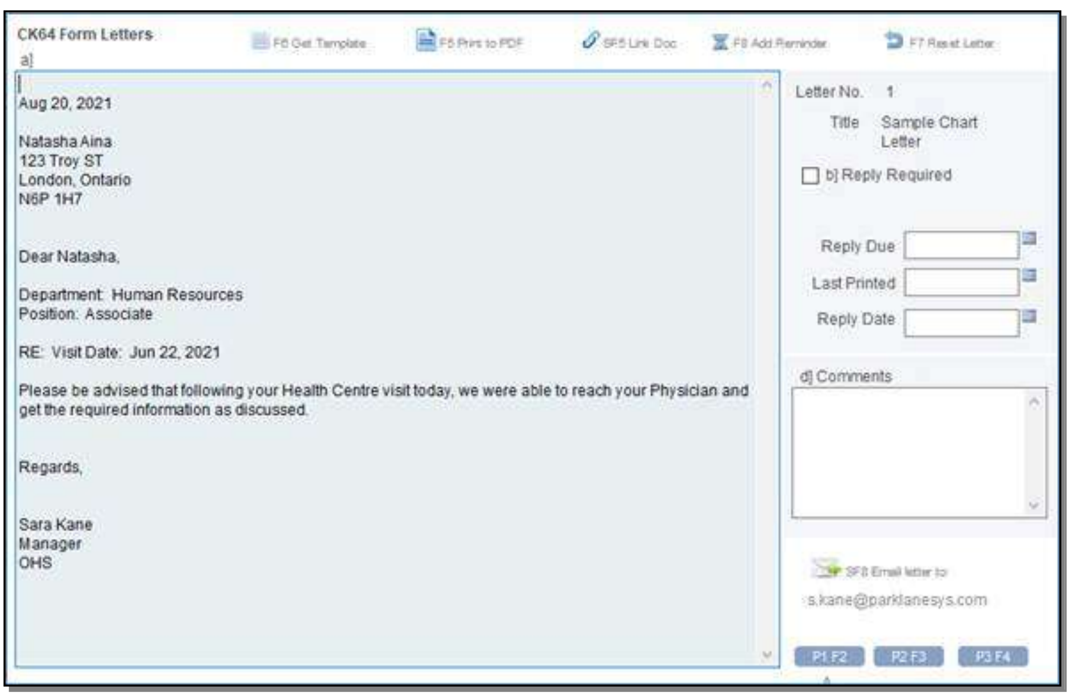
Clicking **Link Doc** will store the letter for future reference on the Document Links panel of the record.

By entering a **Reply Due Date** and clicking on **Add Reminder**, the system will add an activity to the Review Date panel of the record.

When a form letter appears outdated, click **Reset Letter** to initialize the panel to the master form letter template content.

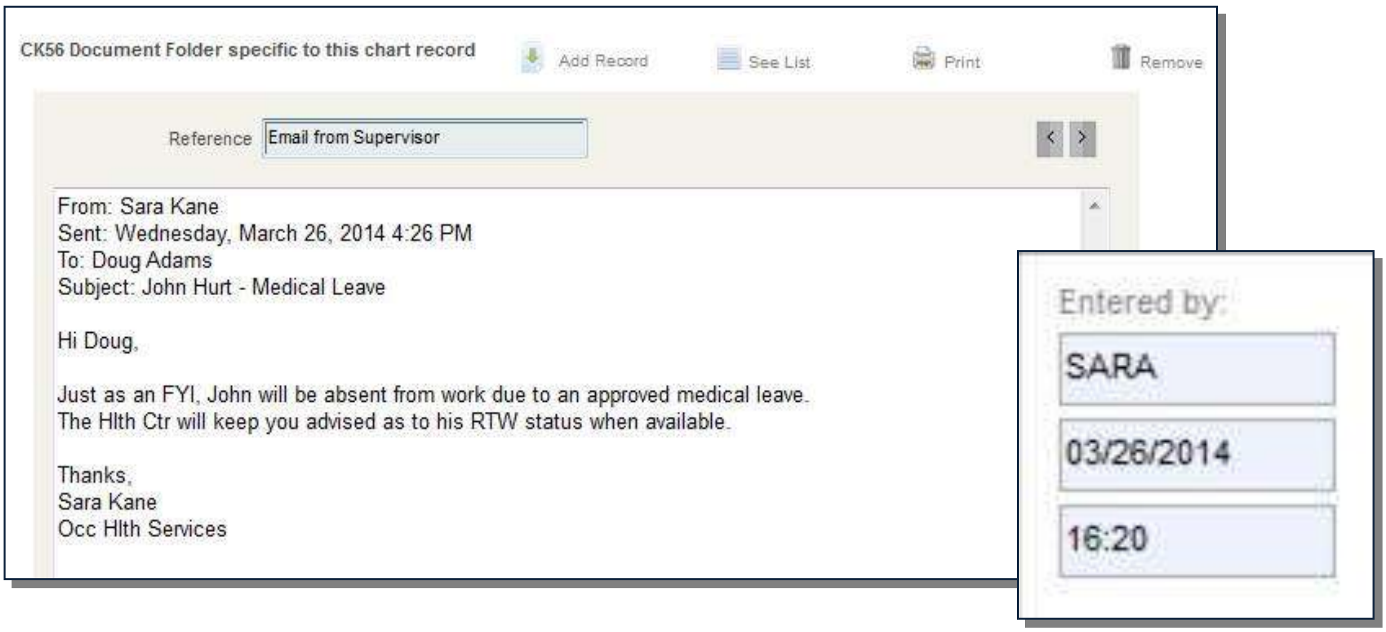
The **Reply Required** box will be checked if the master form letter template identifies that this Form Letter requires a reply. The **Letters Requiring Response** will identify this letter until a **Reply Date** is entered.

To send the letter, click **SF8 Email letter to**: This opens a panel in which the worker's email address will auto-fill, allow for the additional recipients and provide editable text indicating the Form Letter is an attachment to the email. Ten additional attachments may be sent with the letter by clicking attach File F9 or Doc Link SF9 and selecting a file from the browser or from the list of document links. A copy of the letter, a copy of the email and a copy of each additional attachment will be automatically added to Document Links. The emailed Form Letter, the Letter Attachment and all additional attachments will be recorded in the TMB Audit.



Document Folder (Chart)

The **Document Folder (Chart)** feature allows the user to paste text documents or type notes for future review in this record. (Text only, no pictures or images.) The maximum number of characters is 8,000 (equivalent to approximately two pages of a Word document). Once a document is entered, changes may be made by the original author until midnight. The **See List** button lists all documents in the folder. Access to the **Remove** function is controlled by Security. The Remove button will delete document.



Document Links (Chart)

The **Documents Links (Chart)** feature allows the user to link and view documents that are related to the employee in this record.

Documents that can be linked include, but are not limited to:

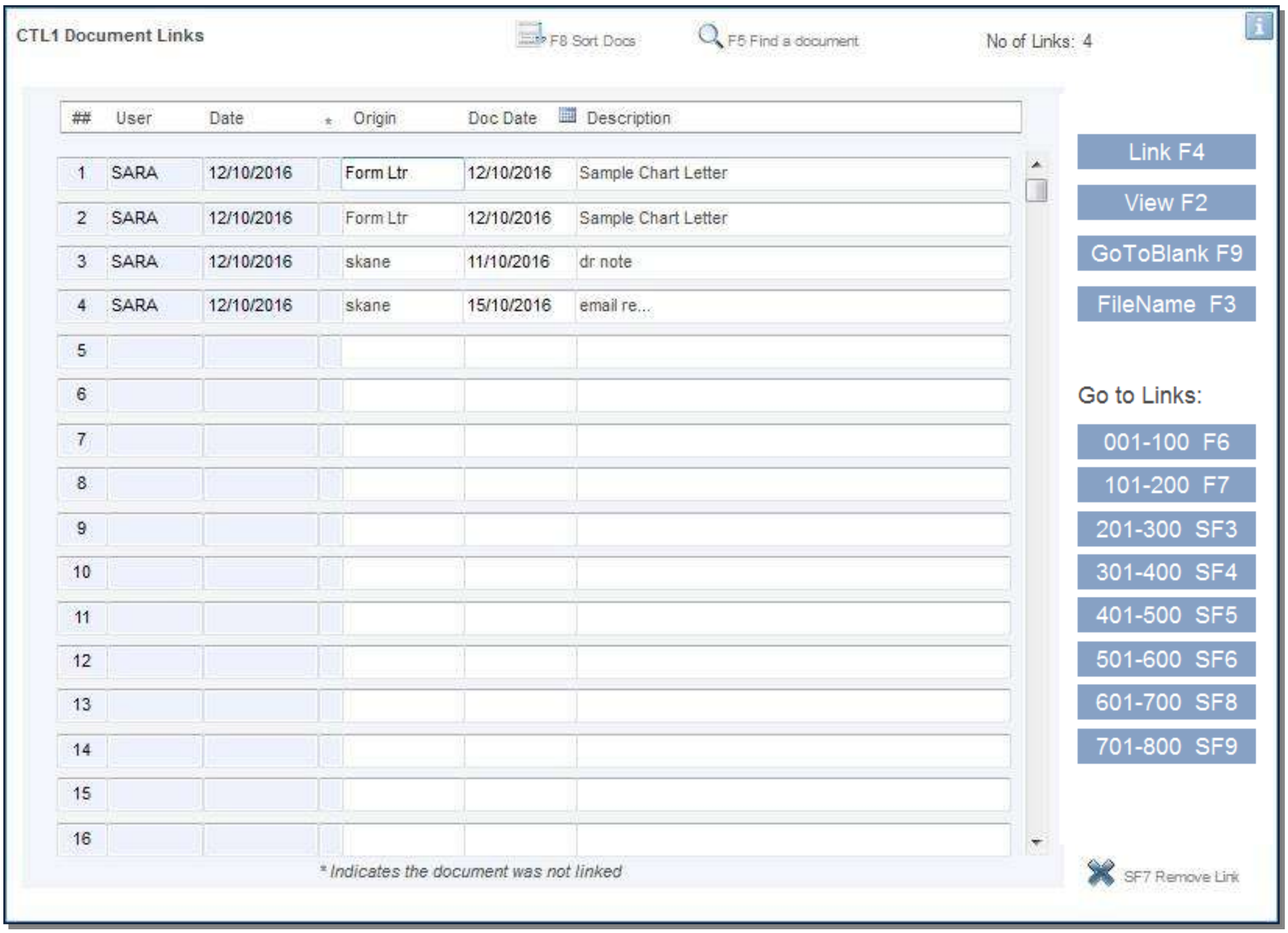
- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

Move the cursor to the Origin column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Add Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **See Link**. The system will call up that document. Up to 800 documents may be linked to one employee.

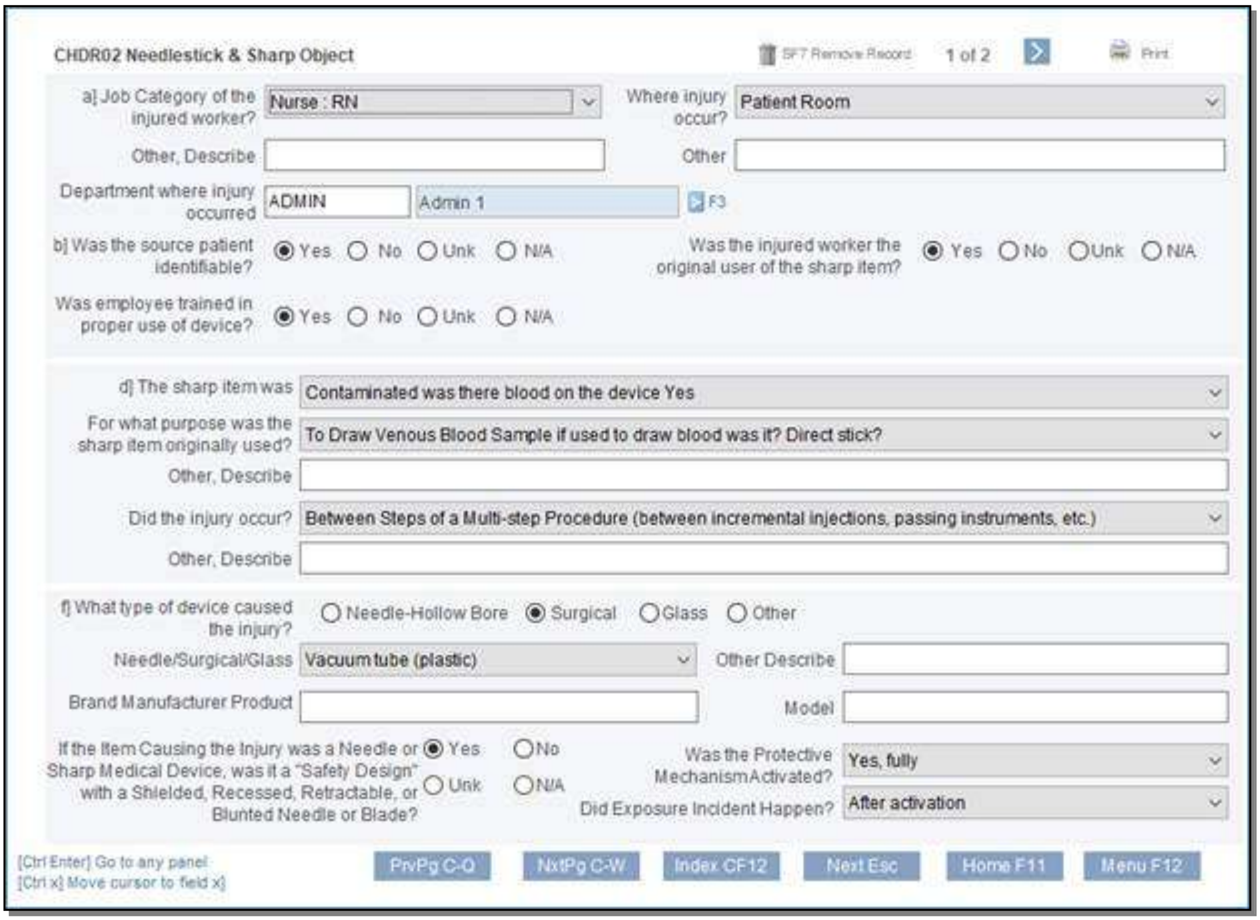
Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

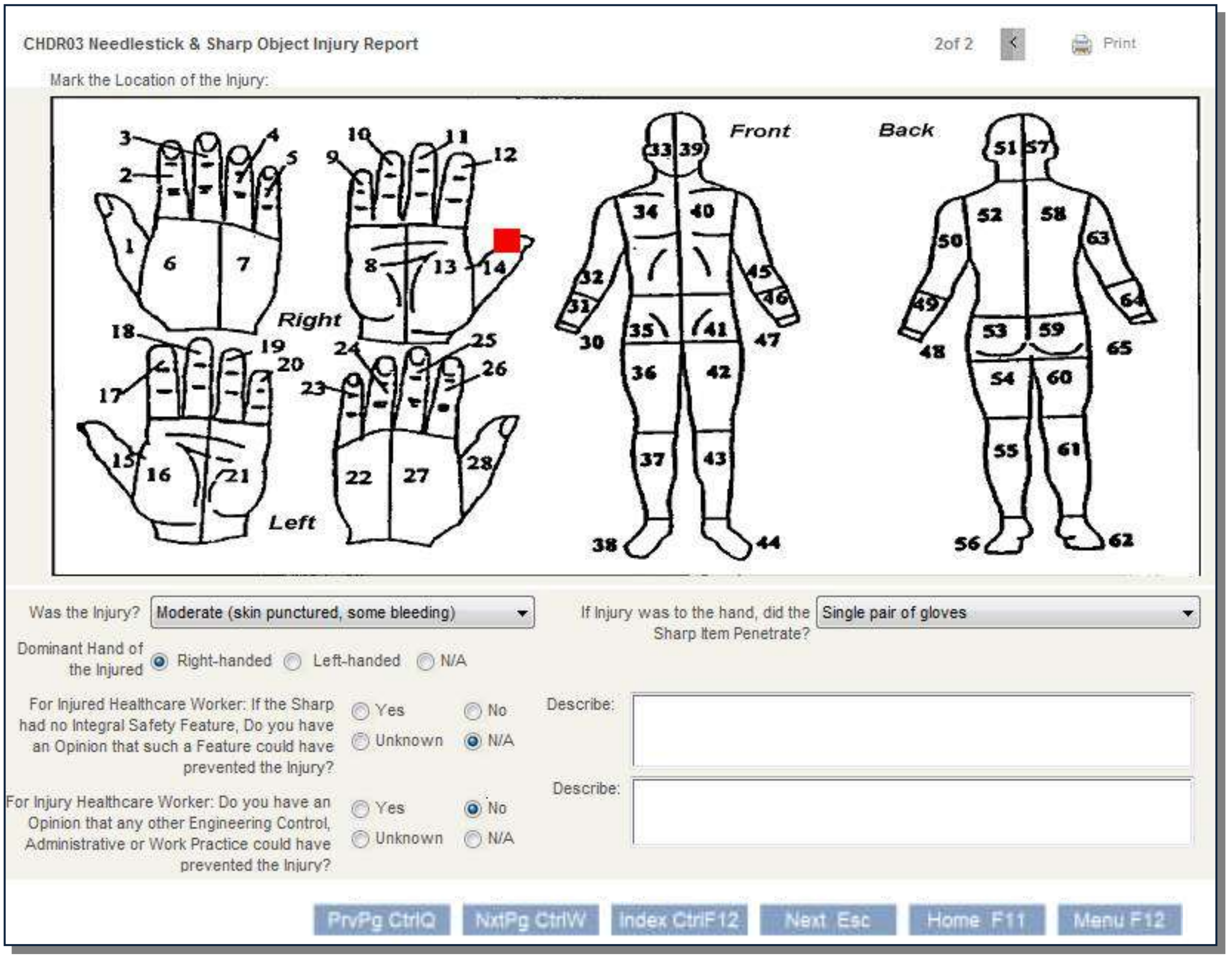
For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.



Needlestick & Sharp Object

The Needlestick & Sharp Object panel is an optional feature which is specifically activated for Health Care facilities in tandem with the Blood & Body Fluid Exposure panel. Pre-defined dropdowns as well a text fields combine for the completion of this panel if the incident circumstances require.




CHDR03 Needlestick & Sharp Object Injury Report 2of 2 Print

Mark the Location of the Injury:

Was the Injury? Moderate (skin punctured, some bleeding)

If Injury was to the hand, did the Sharp Item Penetrate? Single pair of gloves

Dominant Hand of the Injured: (•) Right-handed ( ) Left-handed ( ) N/A

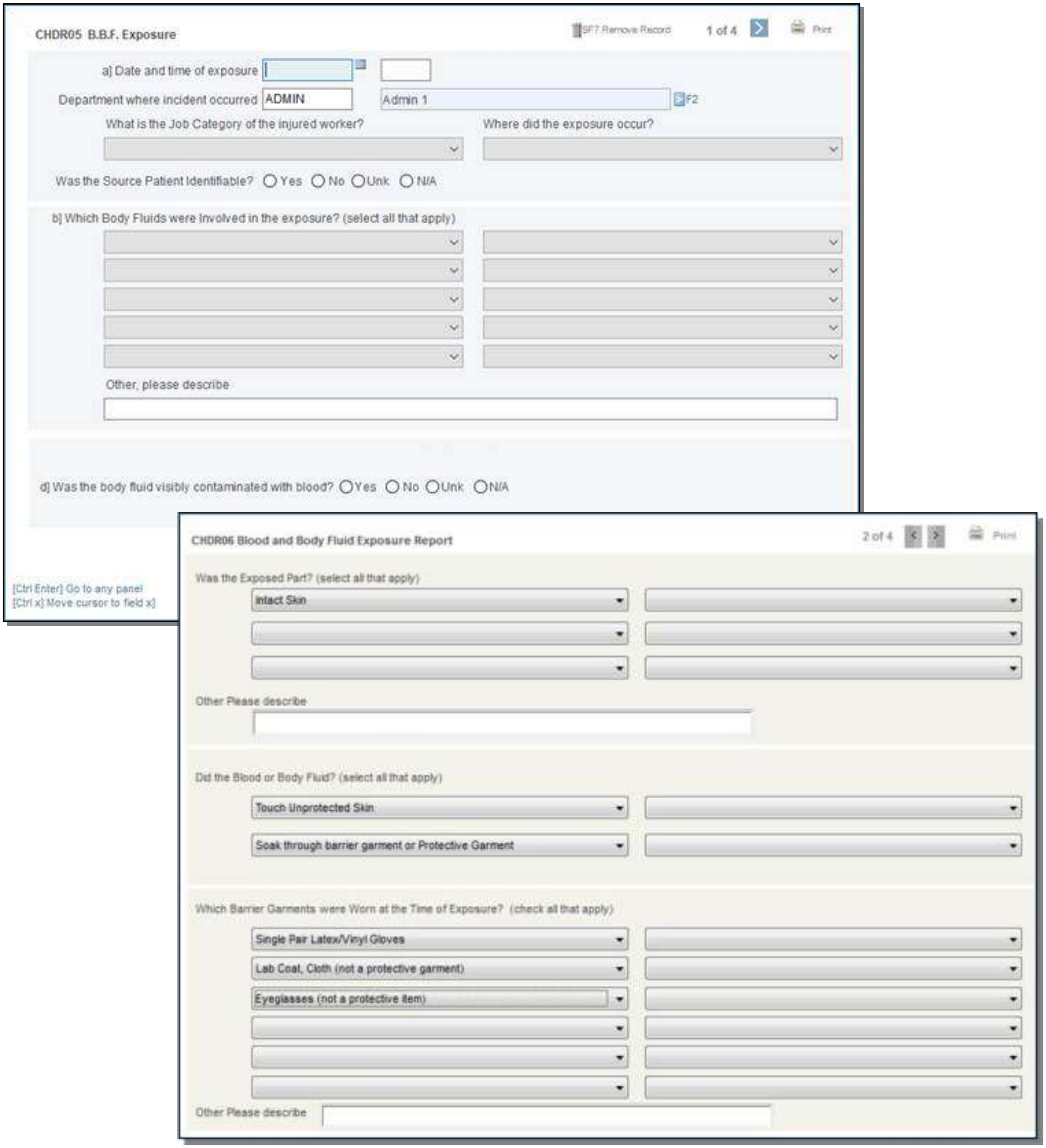
For Injured Healthcare Worker: If the Sharp had no Integral Safety Feature, Do you have an Opinion that such a Feature could have prevented the Injury? ( ) Yes ( ) No ( ) Unknown (•) N/A — Describe:

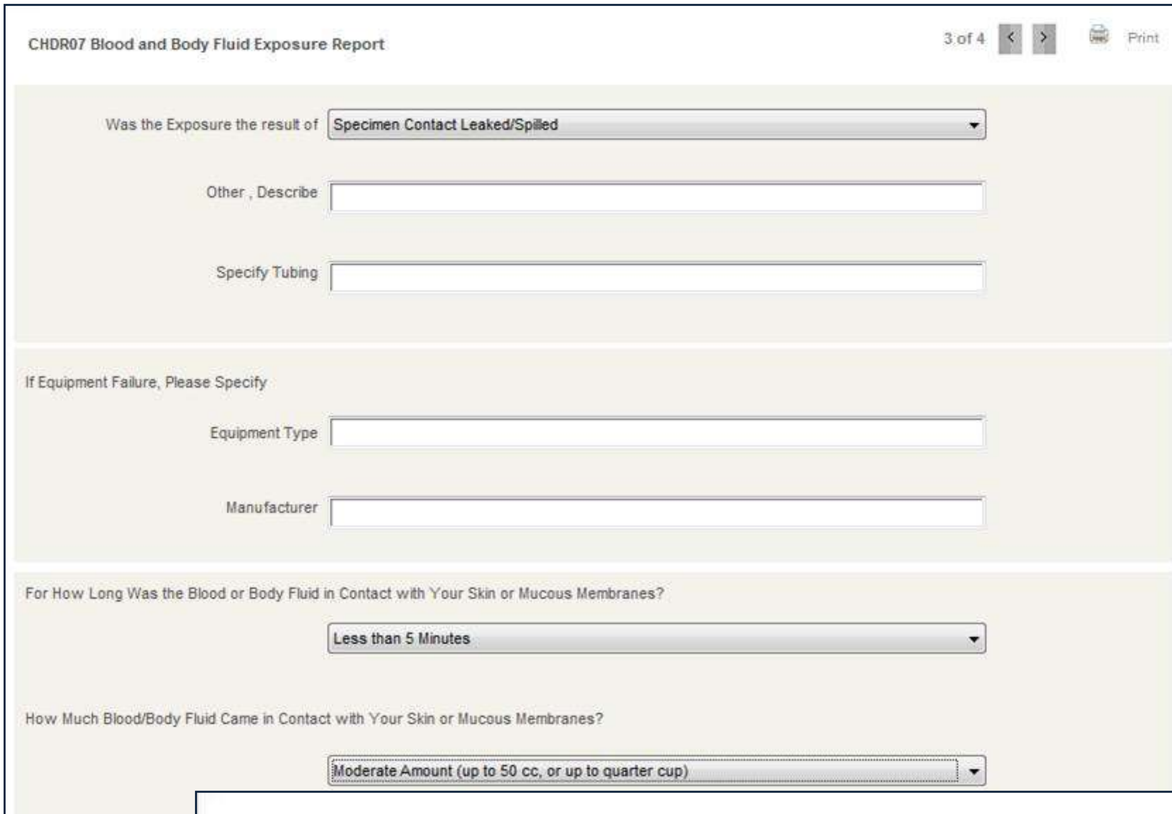
For Injury Healthcare Worker: Do you have an Opinion that any other Engineering Control, Administrative or Work Practice could have prevented the Injury? ( ) Yes (•) No ( ) Unknown ( ) N/A — Describe:

PrvPg CtrlQ | NxtPg CtrlW | Index CtrlF12 | Next Esc | Home F11 | Menu F12

B.B.F. Exposure

The Blood & Body Fluid Exposure panel is an optional feature which is specifically activated for Health Care facilities in tandem with the Needlestick & Sharp Object panel. Pre-defined dropdowns as well a text fields combine for the completion of this panel if the incident circumstances require.





CHDR07 Blood and Body Fluid Exposure Report

3 of 4 Print

Was the Exposure the result of: Specimen Contact Leaked/Spilled

Other , Describe

Specify Tubing

If Equipment Failure, Please Specify

Equipment Type

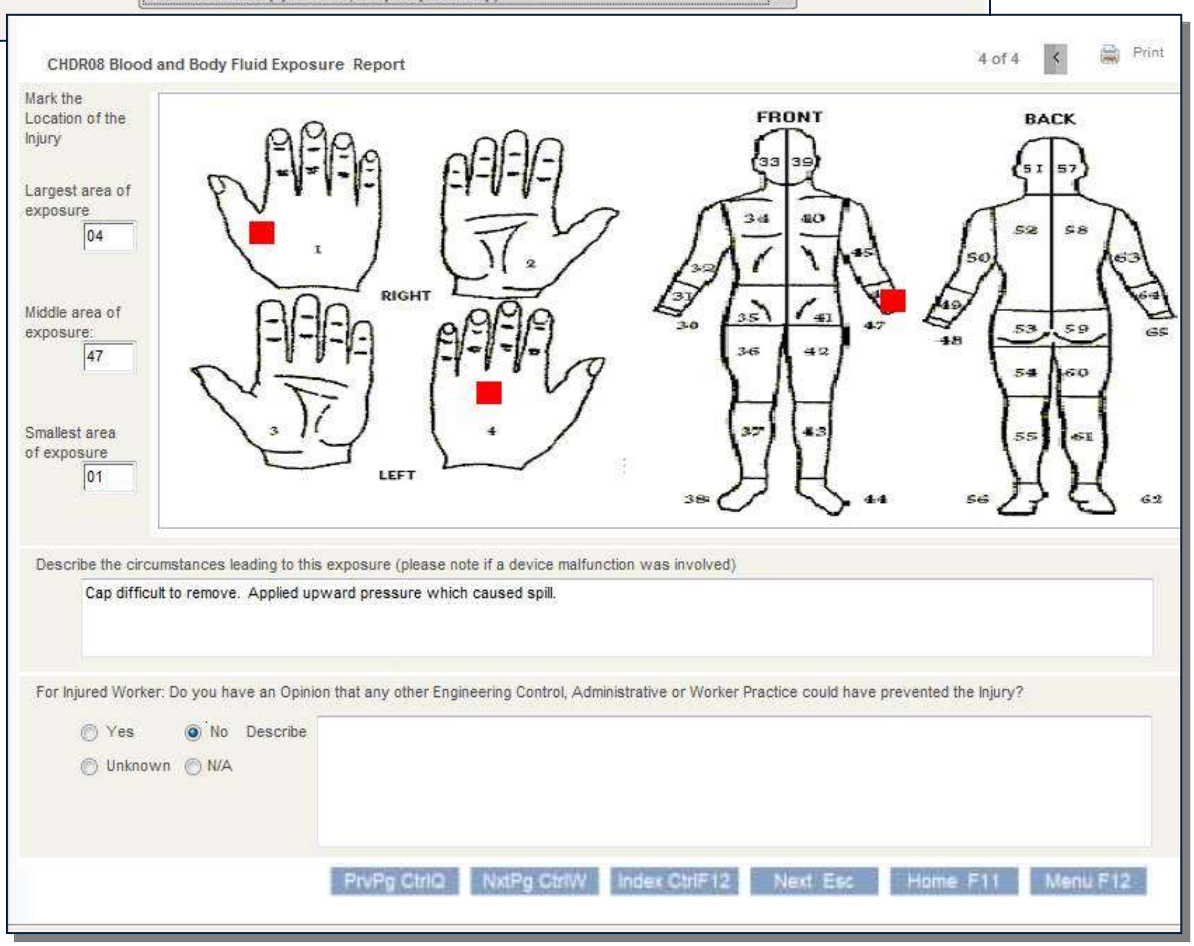
Manufacturer

For How Long Was the Blood or Body Fluid in Contact with Your Skin or Mucous Membranes?

Less than 5 Minutes

How Much Blood/Body Fluid Came in Contact with Your Skin or Mucous Membranes?

Moderate Amount (up to 50 cc, or up to quarter cup)



CHDR08 Blood and Body Fluid Exposure Report

4 of 4 Print

Mark the Location of the Injury

Largest area of exposure: 04

Middle area of exposure: 47

Smallest area of exposure: 01

Describe the circumstances leading to this exposure (please note if a device malfunction was involved)

Cap difficult to remove. Applied upward pressure which caused spill.

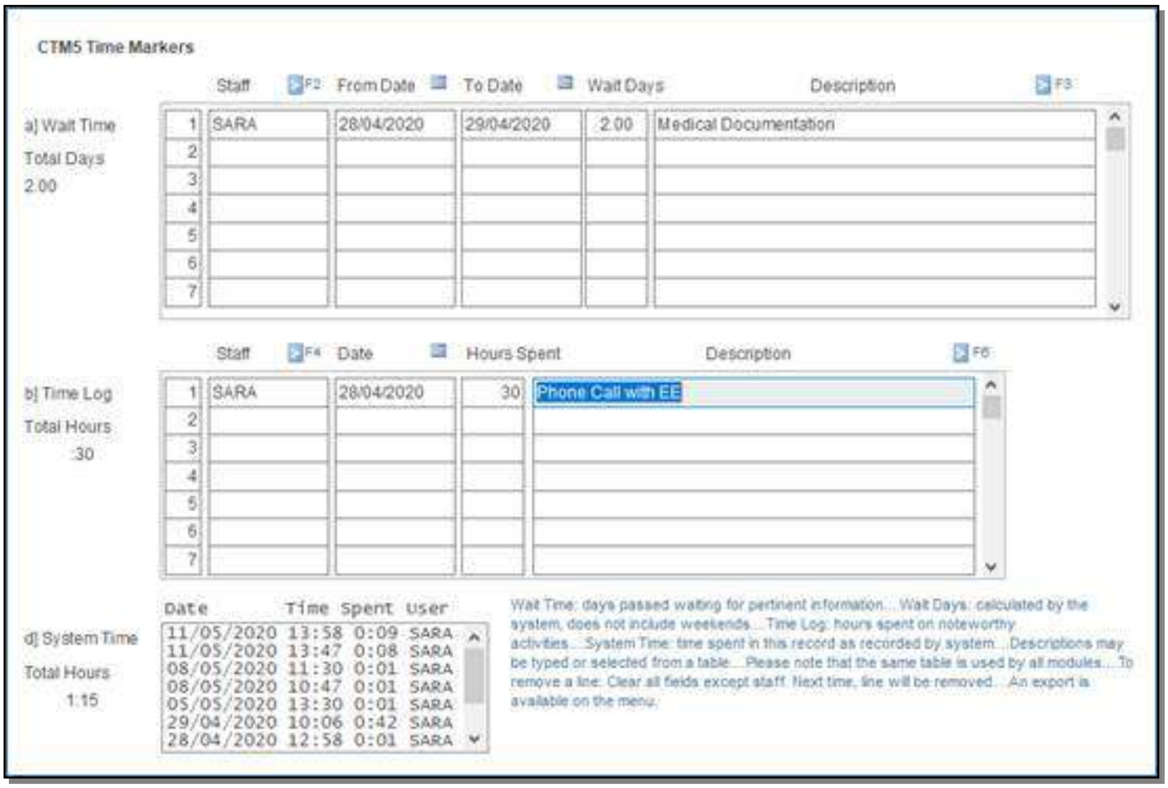
For Injured Worker: Do you have an Opinion that any other Engineering Control, Administrative or Worker Practice could have prevented the Injury?

Yes / No (selected) / Unknown / N/A — Describe

PrvPg CtrlQ | NxtPg CtrlW | Index CtrlF12 | Next Esc | Home F11 | Menu F12

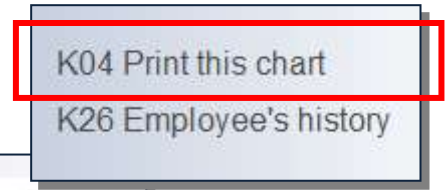
Time Markers

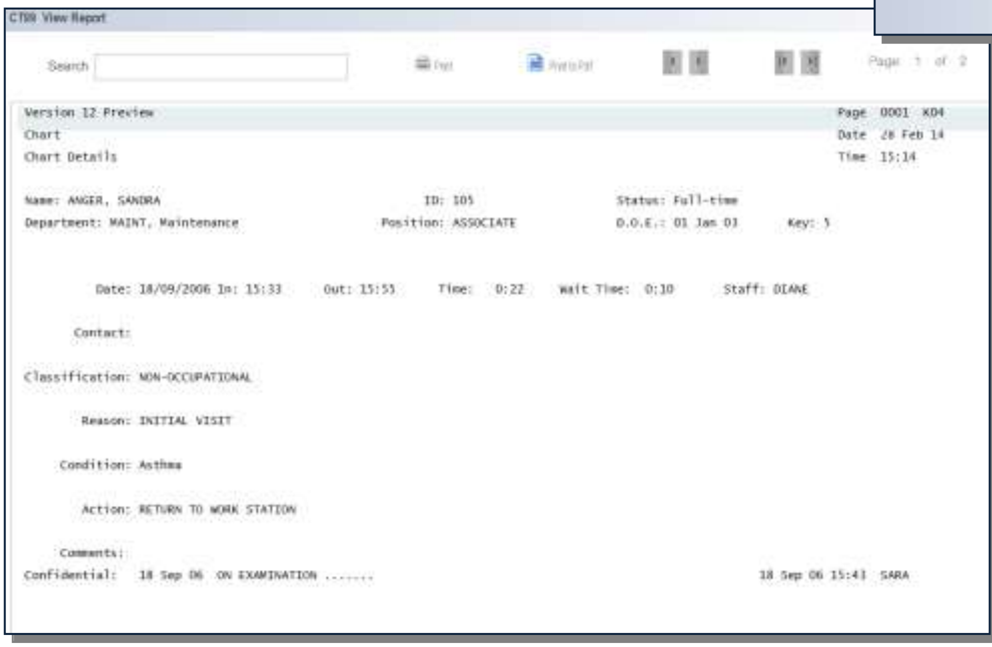
The **Time Markers** panel provides the user with the ability of track time related to various aspects of employee charting. The **Wait Time** fields capture the number of days passed waiting for requested information of documents. The calculated days do not include weekends. The **Time Log** fields capture the number of hours spent on noteworthy activities and meeting related to employee charting. The **System Time** is time spent in this employee as recorded by the system. **Descriptions** may be manually typed or selected from a table. An export is available on the **Charts > Exports** dropdown on the main menu of Chart.



K04 Print this Chart

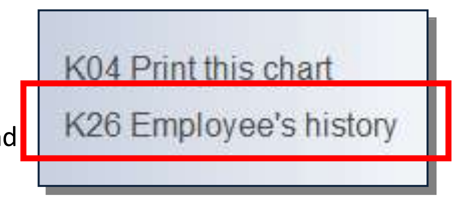
This report allows you to view and/or print the current Chart Record. Click the **K04 Print this chart** option on the sidebar menu and follow the panel instructions to view this report.



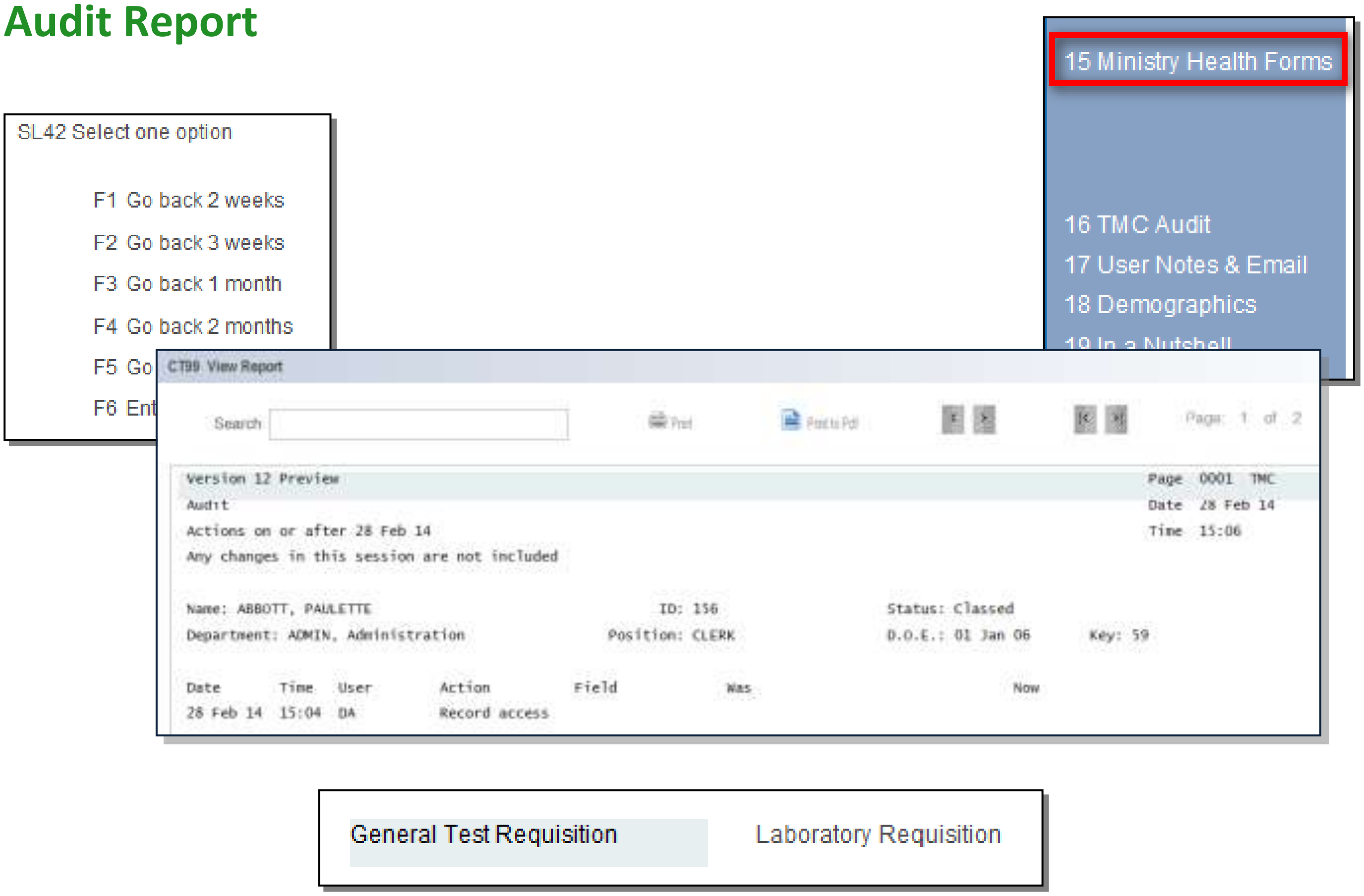


K26 Employee's History

This report provides a history of the employee's chart records. Click the K26 Employee History option on the sidebar menu, select the timeframe and press Continue to view this report.

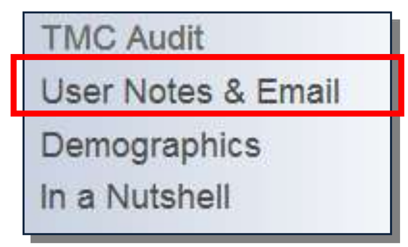


Audit Report



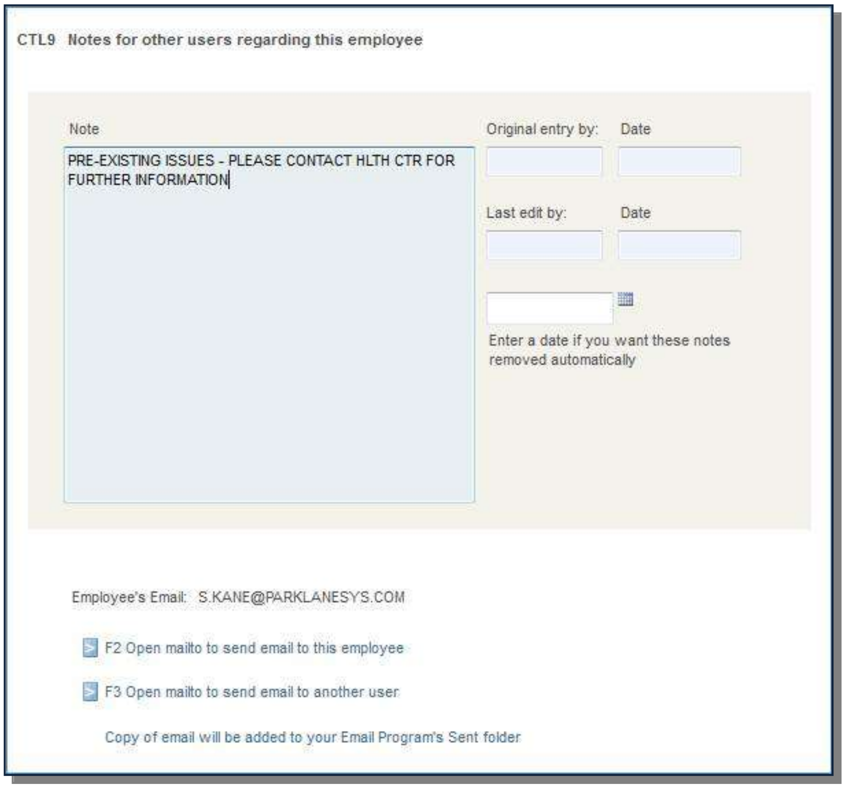
The "**Report TMC Audit**" trail tracks activity in a Chart Record along with identifying the user and the detail of each activity.

User Notes & Email



The User Notes & Email panel provides three features:

- A Note area to enter text, which will globally pop-up in any module opened for the specific employee. The system will auto-fill the original user name and date entered, along with user name and date of most recent edit. A date field is also provided to automatically remove the note if time sensitive.
- **F2 Open mailto to send email to this employee** wherein an email will open applying the employee email address from Personal Data. If no email address exists in Personal Data for the employee, a completely blank email will open. Proceed by entering Subject and the email text.
- **F3 Open mailto to send email to another user** wherein the list of Parklane Users will appear at which point clicking on a name will open applying the users email address from Security. When using either email option, a copy of the email will be added to your Email Program's sent folder.


CTL9 Notes for other users regarding this employee

Note

PRE-EXISTING ISSUES - PLEASE CONTACT HLTH CTR FOR FURTHER INFORMATION

Original entry by: Date

Last edit by: Date

Enter a date if you want these notes removed automatically

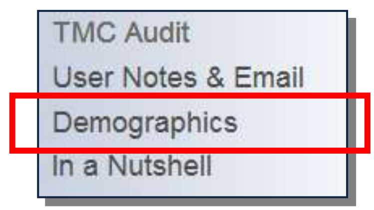
Employee's Email: S.KANE@PARKLANESYS.COM

F2 Open mailto to send email to this employee

F3 Open mailto to send email to another user

Copy of email will be added to your Email Program's Sent folder

Demographics

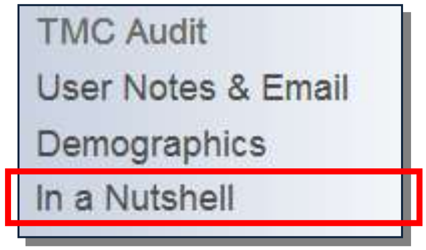


The **Demographics** panel provides a read-only pop-up of the employee's general demographic information. The Demographics panel is available in various module records for easy reference. Security controls which users will have access to the Demographics pop-up on module by module basis.


CT35 Demographics

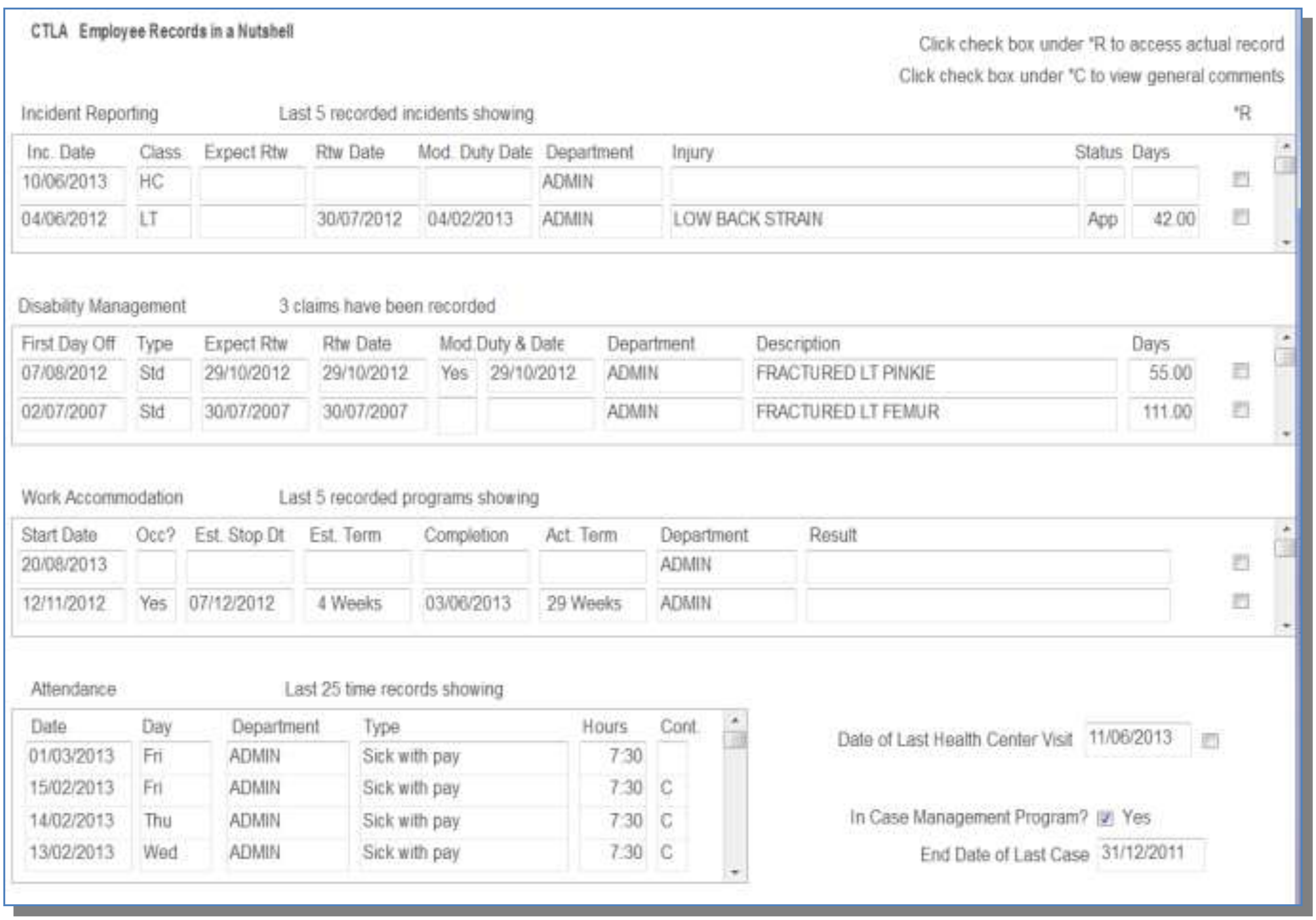
		Health No.	9876527353
Surname	AFFLECK	Department	TES Parking - Meters
Given Name	BEN	Employee Id.	N170
Address	155 NUT ROAD	Status	Full-time
City, Prov.State	LONDON ONTARIO	Position	PARKING METERS
Country	CANADA	Hire Date	01/02/2012
Postal.Zip Code	GIX5C3	Union	UNION A
Home Phone	416 222-2222	Supervisor	FERRELL, KAREN JOAN SUPPORT
Business Phone	519 657-3386 2240		
Cell, Foreign	416 222-3333		
Birth Date	15/08/1972	Daily Hours	8:00
Age	52	Weekly Hours	40:00
Sex	Male	Work Hours	8:00 to 17:00
Marital Status	Married	Miscellaneous	MISC 1 FIELD
Language	ENGLISH	Key	170
Business Email	k.ferrell@parklanesys.com		
Personal Email			

In a Nutshell

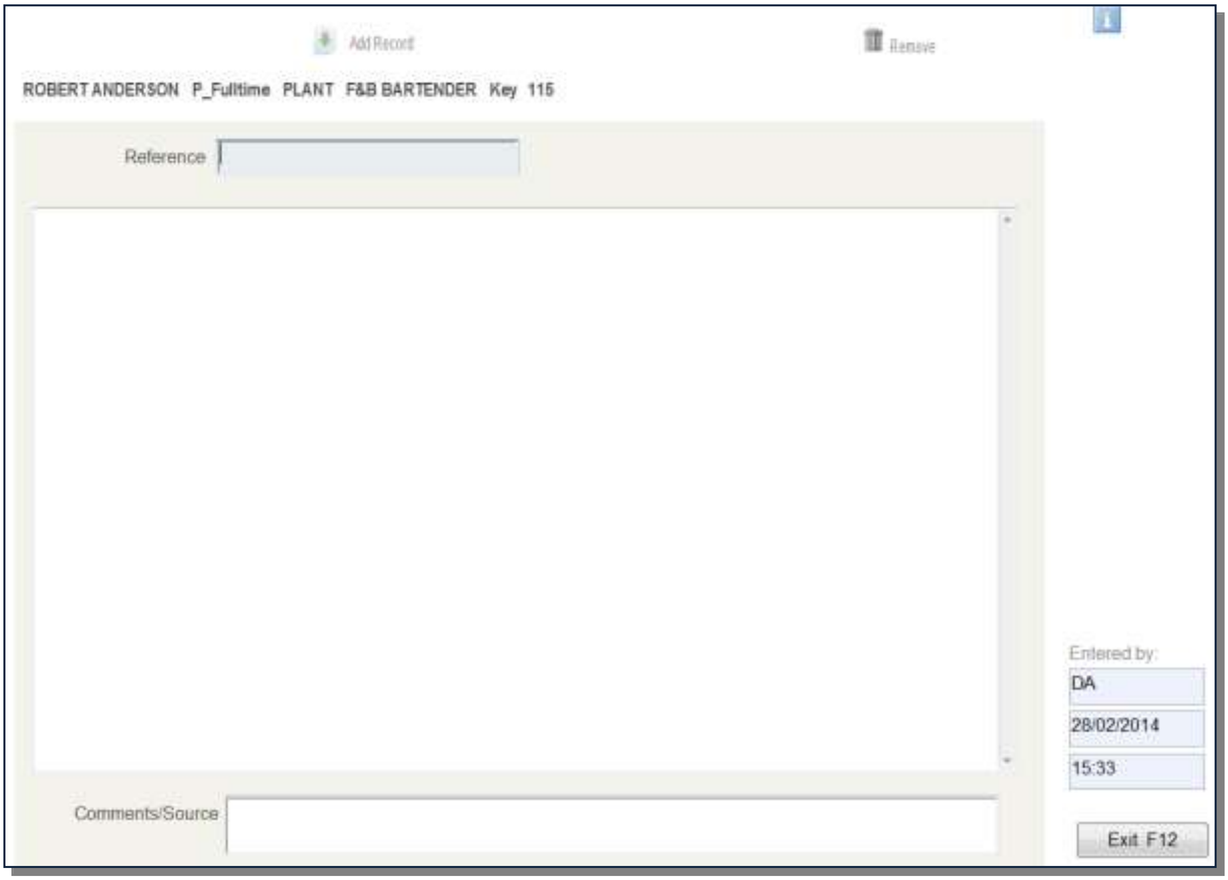


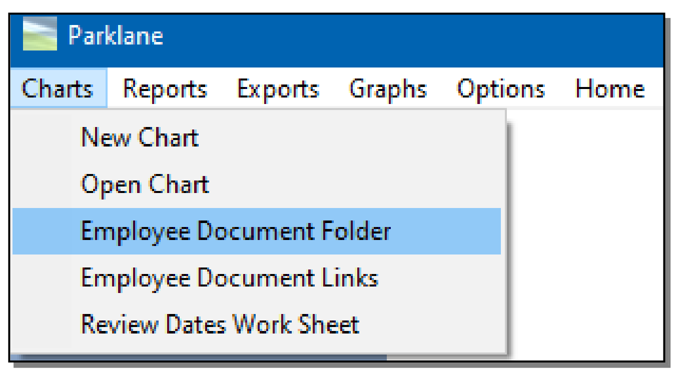
The **In a Nutshell** feature provides the user with a one-page overview of an employee's current records from various modules. The modules included are Incident Reporting, Disability Management, Work Accommodation, Attendance Management and Chart.

Depending on the user's **Security** access, checkboxes to the right provide access to more detailed record information. The "R" checkbox opens the actual record and the "C" checkbox opens the General Comments related to the record. In the case of Incident Reporting, Disability Management, Work Accommodation we can see the most recent five records. Attendance Management will show the most recent twenty-five records, as well as an indicator and date if the employee is in an Attendance Case Management Program. The date of the last Health Centre visit is provided from the Chart module.



Employee Document Folder





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Employee Document Link

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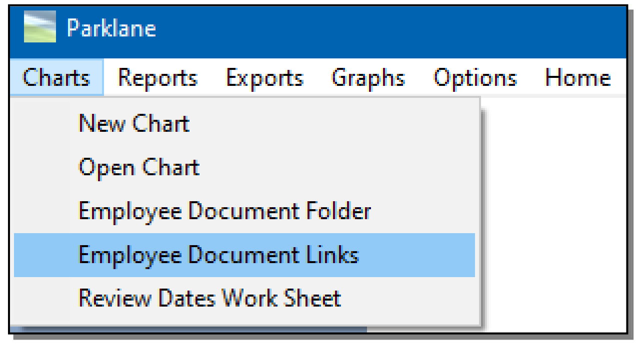

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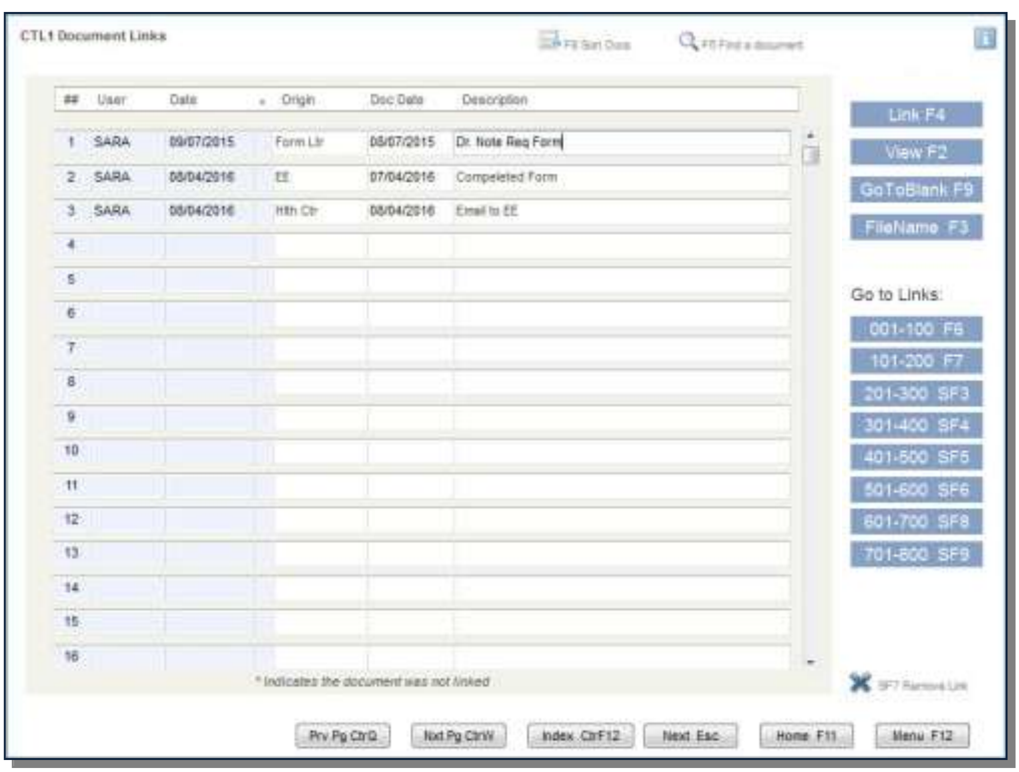
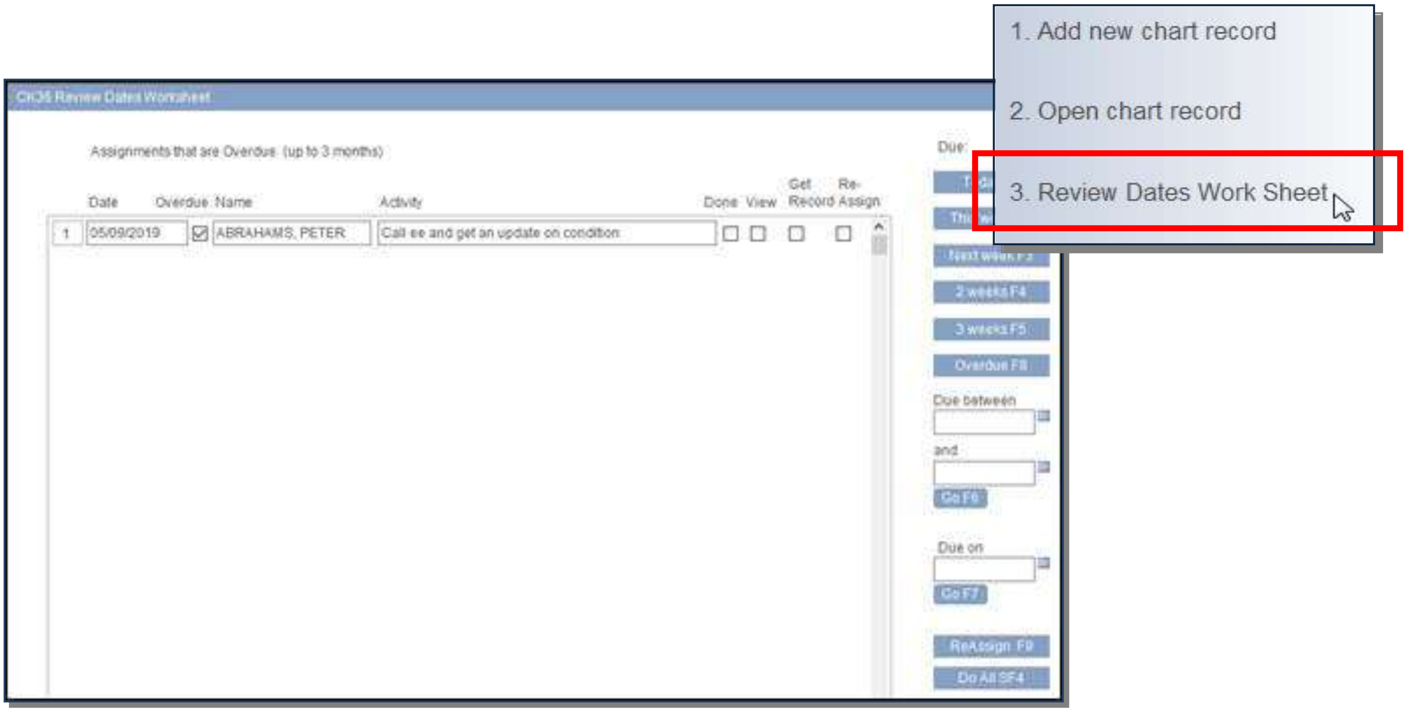


Review Dates Worksheet

The **Review Dates Worksheet** provides immediate access to the currently signed in user's review dates in this specific module.



The view from the module **Menu** panel are your review dates for all employees from this module which are overdue for up to three months prior. Alternative views are listed on the right side of the panel along with fields to enter specific date parameters or specific due dates.

The **Done** check box will auto-fill a review date, stamping it with today's date and the User ID of the user currently logged into the system.

The **View** check box will open a subsequent panel which allows the user to enter text related to the **Action** taken related to the activity, and enter a **Completion Date** for the Action. Do NOT click on the Done check box here, the system will auto-fill.

The **Get Record** check box will open the record associated with the review for the user to add, review or revise information on the panels specific to the record.

The **Reassign** check box, in conjunction with the **Assign F9** or the **Reassign All F14**, will allow the user to assign the review dates to another user one-by-one or on masse.

See the **K22 Review Dates** report for an alternative method to access review dates for one or more users. The K22 Review Date report may be accessed from the sidebar or from the **Reports** dropdown menu.

Reports Available in Chart

Chart

New/Open Chart

K04	Print this chart
K26	Employee's history (2 wks to 3 mths)
TMC	Audit

Exports

K31	Chart Records
K2L	Review Dates
TM9	Time Markers

Reports

K67**	Office Visits
K18**	Selected Office Visits
K08	Summary of Visits
K09	Summary By Month
K10	Summary By Group or Department
K29	Departmental Summary by Month
K15	Selected Visits
K12	Select Attributes
K16	Attribute Totals
K14	Weighted Treatments
K13	Visits Calendar
K22	Review Dates
K74	Letters Waiting Response
K49	Employee History

Graphs

KHA	Visits YTD
KHB	Visit Trends
KHC	Visit Statistics
KHD	Needlestick/Punctures
KHE	Blood & Body Fluid
KHF	Comment Activity Report

Options

K38	Table Record Counts
K23	Missing Fields in Charts
K2J	Comments Audit
K2M	Comments Log
KMD	Audit Report
KMC	Audit Export

** Option to Create Export File in addition to Report

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